TRADE AND INDUSTRY

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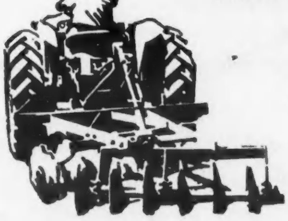

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Competing for agents in Australia

By the British High Commission in Australia

AUSTRALIA is a big country, 12,000 miles away from Britain. It is as far from Perth to Sydney as from London to Ankara. Its population of nearly 13 million is largely of British origin. It has a common language and a long traditional trading relationship with Britain.

These are well known facts. But they are some of the features —a mixture of remoteness and familiarity—which still tend to inhibit the attitudes of some British exporters towards Australia. The idea that it is still an agricultural colony regrettably endures in some exporters minds and produces some surprisingly ill informed and often patronising inquiries about export possibilities. It may help therefore to restate some of the important factors about the Australian market and the part played by the import agent.

In modern travel terms Australia can no longer be considered remote. But it is still very important when planning visits to remember the distances involved in air travel between Australian commercial centres, for instance Sydney to Melbourne is 462 miles, Sydney to Adelaide 743 miles and Sydney to Perth 2,084 miles.

Britain is no longer Australia's principal trading partner, a position which it held until quite recently. Although in terms of value our exports to Australia continue to grow, the British share of Australian imports has declined from 38.5 per cent to 21.4 per cent in the past 12 years. There are various reasons for this: import replacement by Australia's own manufacturing industry developments, in which it must be remembered that British investment has a substantial stake; the removal in 1960 of import and foreign exchange controls which had previously worked to the British exporter's advantage; the increasing competition we have met in recent years from other overseas suppliers.

Australia today is an affluent industrial society with nearly 40 per cent of the work force engaged in manufacture and building and with one of the highest standards of living in the world. It is an increasingly discriminating import market where sales can only be achieved against strong competition from many efficient suppliers, both local and overseas.

No longer can British exporters expect Australian buyers to be influenced by ethnic ties. They shop around for the best value and service. And this includes the Australian subsidiaries of British companies. It is nevertheless true that many Australians still tend to buy British, all else being equal. It is important to remember also that half the Australian population is under 26 years of age and largely unaffected by British 'family' loyalties. They will buy what is good value or appeals to them without regard for its source of supply.

This is the second in an unnumbered series of articles dealing with aspects of overseas markets which are of continuing importance to Britain. The largest markets will be dealt with by more than one article appearing in successive issues. Two articles are being published on Australia. The first of two features on France will appear next week and will discuss the market for capital goods.

The most vigorous of the newer suppliers to the market—the USA, Japan and to an increasing extent Germany and Italy—operate without the advantage or the pitfalls of the long trading connection which British exporters enjoy, including the benefits derived from the British Preferential rate of import duty. They are seen to approach the market in a modern way, to conduct extensive market surveys, enter into firm arrangements with their agents, visit the market frequently and apply all the means of modern communication.

These then are the changing conditions, in which British products must be vigorously sold and where confidence in the supplier is vital. It seems absurd that even where a British manufacturer has a good product, sales should fall short of their potential because of failure to maintain adequate arrangements for representation in the market. The majority of British suppliers are selling through good agents but there are still many instances where sales are not actively promoted by agents, often due to uncertain supply. In many cases this is a matter of poor communication between agent and principal.

A great deal of British business is conducted through manufacturers agents. Because of long standing trading connections many of these were engaged years ago with no more than a gentleman's agreement and a handshake. In consequence there may be no clear definition in many cases of the obligations on either side. The most frequent problems encountered by importers concern delivery service and communications. It could be that many of these arise because of the loose nature of the arrangements between some manufacturers and their agents. British exporters who wish to continue to take advantage of the trading opportunities offered in the expanding Australian eco-

(*continued on next page*)

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nomy are advised therefore to take a critical look at their current marketing policy.

It is important to remember that many of the 500 or so British manufacturing subsidiaries in Australia grew from agency relationships. Some Australian agents therefore have this possibility in mind and may seek to safeguard their interests in any formal agency agreement they may make with British principals. British firms with products for which there are good prospects should take full acount of this when appointing an agent.

How to go about finding an agent

It is generally considered advisable for a British principal to be represented in each of the state capitals of Australia (except Tasmania which can normally be covered from Melbourne). This is particularly important in Western Australia because of its physical isolation from the Eastern Seaboard. The alternatives are to appoint a number of separate agents each holding a direct franchise or to appoint a single firm with headquarters in one state and offices in each of the others.

In such a large country with a relatively small population scattered throughout six states good agents are scarce. The initial presentation of the agency inquiry therefore is all important. The first approach should be to the General Export Services Branch of the DTI in London or to your nearest DTI regional office who will be pleased to discuss your agency requirements and advise you what assistance we can provide to help you find a suitable agent.

In Australia it is quite as important that the presentation of the product in all its aspects—design and performance, packaging, advertising support, after sales services etc is as good as on the home market. Unfortunately it is not always so. Our main competitors—the USA, Japan, Western Europe, clearly recognise the psychological importance of good presentation and it is vital that British firms should not suffer in comparison.

It is worth considering what the prospective agent will want to know. Although some of the points set out below may appear obvious or even superfluous, experience has shown that this is the minimum information required if the inquiry is to have any prospect of success.

The prospective agent will require as much technical and illustrated information as can be supplied, and full descriptive literature should accompany every proposal. The agent will also want enough background details of the British firm to help him to form an opinion about the ability of the manufacturer to stand behind his product if the agent is successful in establishing it on the local market. It is both frustrating and damaging if a supplier is unable to keep pace with demand once the product has been launched and established.

The agent must be in a position to calculate the selling price of the product offered if he is to assess the likely chance of success in the market. In the great majority of cases price is the decisive factor. An Australian agent will need both the seller's fob price, which should be net and exclude all quantity discounts while including the addition of packing charges, if any, and—ideally—the cif price quoted in Australian dollars. If for any reason the freight and insurance estimates cannot be obtained, the weight, case dimensions and contents of a typical shipment should be supplied to enable the agent to calculate, as accurately as possible, the carriage costs involved in getting the product into his store. He still has to calculate landing charges, clearing charges, bank charges, cartage from wharf to store, duty, sales tax and then a price structure for distribution to arrive at a suggested selling price. He can, with a little effort, arrive in this way at an estimate of the cif price on his own, but clearly the more pricing information the British manufacturer offers, the easier will be the agent's task in calculating his selling price and the more favourably will he be disposed towards the proposition.

Difficulties frequently arise between suppliers and agents in this distant market over supply and communication. Many importers are obliged to hold larger stocks than they would normally need, to protect themselves against delivery and shipping delays. Rightly or wrongly an impression has been formed in the market that British firms underestimate the importance of main-

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taining a strict delivery schedule. There is also a tendency to neglect to advise the agent and/or client as soon as a change in the delivery position becomes known. Late delivery is bad enough but no warning or explanation is worse.

A final area to which particular attention should be paid is that of communication. The impression is widespread in Australia that a Japanese supplier will think nothing of telephoning Sydney or Melbourne in response to an inquiry, and that a United States supplier will frequently submit a quote by telex in a matter of hours. Of course many British firms do likewise. Nevertheless the importance of promptly answering all communications received from agents, prospective agents and customers cannot be over stressed. It should be unnecessary to advise in the 70's that all communications of this nature should be by telex, cable, telephone, or airmail, but it is disturbing to note that quite a number of business letters still arrive in Australia from the United Kingdom by sea mail. A prospective agent or a client forms his impression of the principal very largely from the quality and presentation of literature and the manner in which correspondence is answered.

The Australian market is being increasingly affected by the rapid development of its own indigenous industry. Aggressive wooing by other countries shows no sign of abating. It is therefore important that British firms seeking export sales in Australia should take full account of the marketing effort required, while firms already selling in the market should take a critical look at their local operations in the light of changing conditions to ensure that their methods are matching the needs of the times.

Tranquillisers referred to Monopolies Commission

MR. John Davies, Secretary of State for Trade and Industry on September 14 asked the Monopolies Commission to investigate the supply of:

(i) chlordiazepoxide and salts thereof; and
(ii) diazepam and salts therof.

A copy of the reference follows:

Where it appears to the Secretary of State that it is or may be the fact that conditions to which the Monopolies and Restrictive Practices (Inquiry and Control) Act, 1948, as amended by the Restrictive Trade Practices Act, 1956 and the Monopolies and Mergers Act, 1965, applies prevail as respects the supply of each of the following descriptions of goods, that is to say:

(i) chlordiazepoxide and salts thereof; and
(ii) diazepam and salts thereof.

Now, therefore, the Secretary of State in exercise of his powers under section 2(1) of the said Act of 1948, as so amended, hereby refers to the Monopolies Commission for investigation and report the supply in the United Kingdom of each of the two descriptions of goods hereinbefore specified.

The Commission shall as respects each of these matters investigate and report on whether the conditions to which the said Act of 1948, as so amended, applies in fact prevail.

The Commission shall, if they find that the said conditions prevail as respects each of these matters, thereafter confine their investigation to the question whether and to what extent the following thing is done by the parties concerned as a result of, or for the purposes of preserving, those conditions, that is to say:

the determination of the level of the prices at which each of the two descriptions of goods hereinbefore specified are supplied,

and if so, whether or not such thing operates or may be expected to operate against the public interest.

For the purposes of this reference

(i) 'Chlordiazepoxide and salts thereof' shall include preparations consisting of chlordiazepoxide or any one of its salts and an excipient, vehicle, base or preservative (with or without the addition of other active ingredients); and
(ii) 'diazepam and salts thereof' shall include preparations consisting of diazepam or any one of its salts and an excipient, vehicle, base, or preservative (with or without the addition of other active ingredients).

Dated this 14th day of September 1971

Any person or organisation wishing to offer evidence in relation to this reference should write to the Secretary, Monopolies Commission, New Court, 48 Carey Street, London WC2A 2JT.

After attending the Fourth United Nations International Conference on the Peaceful Uses of Atomic Energy, in Geneva, the Japanese Minister of State for Science and Technology, Mr. Hiraizumi, paid a brief visit to the UK. During his visit, Mr. Hiraizumi, who is Chairman of the Japanese Atomic Energy Commission, met Lord Drumalbyn, Minister without Portfolio, at the Department of Trade and Industry.

Imports of butter, near-butters and ghee

THE Department of Trade and Industry is to extend until March 31, 1972 the arrangements for open individual licensing of butter imports in supplement of the annual quota system. Near-butters and butter oils imported during the same period will continue to be subject to specific import licensing supplementary to the annual global quota, and similar supplementary arrangements are introduced for imports of ghee. Applications for specific licences for near-butters and ghee should be made to the Department of Trade and Industry, Import Licensing Branch, Sanctuary Buildings, 20 Great Smith Street, London SW1.

Notes

The introduction of open individual licensing for butter supplementary to the quotas was announced at the end of April 1971. In Mid-June these arrangements were extended until September 30, 1971 and the supplementary arrangements for near-butters were introduced.

Existing holders of open individual licenses for butter will be informed of the extension to their licences and they will be required to make returns of imports not later than April 15, 1972. Specific licences for near-butters and ghee will be available on application to existing licence holders or others who have firm offers of supplies for use in the UK. Imports may be brought in under the licences from any source except Southern Rhodesia. A notice to importers will not be issued on this occasion.

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Five objectives for industry in an enlarged Community

—Mr. John Davies

MAJOR developments in industrial policy in an enlarged European Economic Community were forecast by Mr. John Davies, Secretary of State for Trade and Industry, when he addressed members of the Ubersee Club in Hamburg on September 16. There were, he said, five important objectives where 'progress on a continental basis is likely to secure results greatly in advance of those we might contemplate nationally'. These were:

1. To treat Europe as a single market
2. To develop new policies for working relationships to keep pace with social and technological changes
3. To ensure that all regions share in the benefits of economic growth
4. To increase scientific and technological co-operation
5. To safeguard the environment.

The continental-scale market

'Much is said—and particularly in Great Britain over recent months—of the great benefits to be attained by being part of a home market of some 300 million people', Mr. Davies said. 'I am in no doubt whatever of these benefits. I am equally in no doubt that practical and intense effort will be needed to enable industry to enjoy them.

'We are still far from looking upon Europe as a single market rather than as an assembly of individual national ones associated in a manner to facilitate trade between them. This is partly a question of attitude where the entrenched national view yields slowly to a realisation of fundamental change. It is partly due to the relative absence as yet of administrative systems and institutions conceived on a continental scale to facilitate the concept of a single market. Both require thought and action.

'Until the concept is a reality and one whose existence is recognised throughout industry the benefits will only be partially realised. Benefits concerned with industrial structures appropriate to the scale of the market: benefits concerned with continentally framed investment and marketing programmes: benefits derived from integrated financing operations and so on.

'It is only where these benefits flow in more fully that our European potential will be on the way to achievement in terms of assuring our own people of better living standards; of contributing more effectively—and particularly through industry itself—to the needs of the less-developed countries; of restoring the former pre-eminence that our continent enjoyed in scientific and cultural advance. All of us recognise that in order to be a match for the industrial ingenuity and resource of the so-called super powers we have not only the heritage of fragmentation to overcome but also the relative absence of indigenous natural resources. For European industry to face on equal terms the capacities of its competitors world-wide it needs to gain an ascendancy in its capabilities able to offset the need to seek elsewhere the supply of the bulk of its primary materials.

Working relationships within industry

'It seems to me very significant that it is in Western Europe that there have been emerging in recent years new patterns and new thinking in the whole field of the human relationships in industry. They have in some countries, like my own, been accompanied by difficult labour problems that are perhaps an inescapable element of change. Moreover the nature of such changing relationships have been far from consistent in different countries. Your own concern here with the association of the work-force with the supervision and control of industrial enterprises contrasts with the pressures we have been experiencing in some instances against unilateral management decision pre-empting the consultative mechanisms with labour. Both are in form dissimilar from pressures elsewhere to relate the rewards of work more closely with the financial performance of the enterprise itself.

'Despite these dissimilarities there is a common theme running through our industrial relationships calling for new lines of thought and behaviour at the place of work. Our own recent hard-contested legislation in this field unquestionably marks an important step along the road. But my contention is that there is still very much more to be done in fashioning an industrial community in our continent to the needs of the latter half of the present century. My belief is that it is a field of work that will greatly benefit from common experience and common policies. It seems to me clear that as progressively labour-intensive processes give way to automated ones preparation for the consequences of that change will need to be undertaken on something wider than a purely national basis. Not only is such a community objective important in the sense of pooling experience and ideas but it is no less so the view of the labour mobility which constitutes a basic principle of the Communities themselves.

Industrial efficiency and continental homogeneity

'As our respective economies have emerged and developed so rapidly in technological terms we have all of us in Western Europe experienced in different ways the problems of regional obsolescence and stagnation. Industry rightly seeks to optimise its performance in the circumstances in which it finds itself and understandably plans developments in location which it believes to be to its best advantage. But such developments may not always be in the interests of the economy as a whole and in social terms tend to work on a time scale which is different from that of changing patterns of population settlement. And, of course, while it is quite right that Government must have regard for economic factors in considering questions of industrial distribution, they cannot overlook the human and social problems which lie behind economic change. It is for this reason that all advanced industrial countries have adopted policies to correct regional disparities by offering incentives and, in some cases by implementing constraints, to ensure that national interests are more fully reflected in the location decisions of individual firms.

'My belief is that the very success which the wider market of the EEC has had and will have in industrial development makes it essential that vigorous policies should be pursued to ensure that all areas share the fruits of economic growth. The growth of European industries, as opposed to purely national ones, will underline the need for the Community to develop a Community regional policy which complements the regional policies pursued in individual member countries.

'The dilemma of reconciling the need to improve the regional infrastructure with the assurance of the provision of adequate employment and thereby the creation of local resources to sustain the improvement has proved to be a taxing one. After 20 years of operating regional policies of a more or less consistent kind in Great Britain there are still undoubtedly great areas of ignorance of the real cost benefit factors: here too the pooling of community experience and effort is likely to prove highly advantageous.

Scientific and technical progress

'It does not need me to add emphasis to the risks that Europe has run and is still running in failing to retrieve its pre-eminence in certain fields of industrial science and technology and also in failing to exploit new achievements to the full. This is no case of desire for achievement simply for its own sake or as a matter of *amour-propre*. The issue is far more critical than that. The link between educational and industrial development is exceedingly close. Failure to ensure suitable employment in the research and development field in the end can but spell inability to provide the educational capability related to such activities. The circle is a vicious one and the consequence of continuing deterioration in internationally comparable terms can but be damaging to ensuing generations.

The Secretary of State for Trade and Industry, Mr. John Davies, last week addressed the Manchester Chamber of Commerce on the dynamic effects of entry into the Common Market (see 'Trade and Industry', September 16, page 518). In this picture Mr. Davies (third from left) is seen with members of the Chamber.

'And yet we are confronted daily with the virtual impossibility of sustaining these activities by nations or nation-based enterprises acting on their own. The problem is deeply involved with that of which I first spoke—namely of adaptation to a continental scale market. But it goes still more deeply. The degree to which industrial effort in these fields is enmeshed with state effort is already great and grows greater. Community policies to support and broaden these fields of co-operation are vital to the survival—let alone the resurgence—of European capacities: and not in the field of fundamental research alone. Indeed it is arguable in the situation in which we find ourselves the greater immediate need may be for imaginative policies for collaboraation in the development of existing scientific knowledge rather than in its extension—important as the latter is.

Industry and the environment

'The environment is not just news, it is indivisible. The collision of two tankers of non-European nationality in the Straits of Dover constitutes an environmental hazard for at least four countries through actions to which no one of them is party. The pollution of our air can have its fall-out on you. The noise nuisance of British aircraft over Hamburg is not off-set by the parallel nuisance of German aircraft over London.

'Industry's past record in its case for the environment is not a very proud one. In great industrialised nations like ours the spectacle of past indifference is everywhere to be seen and the task of rehabilitation is the more serious the longer the industrial history has been.

'Here again community policies seem to me to be necessary unless the heritage we are to leave to our integrated continent is an adulterated and despoiled one. Happily the concern for the conservation and improvement of our environment has been a universal and virtually instinctive reaction to the results of heedless development. But once again national effort is not enough and must be supplemented by a broader concern striving for continental standards of improvement.

'There is another area of importance closely allied to the more conventional interest in the environment. I refer to the whole problem of the conservation of natural resources. Our sophisticated industrial societies have a gargantuan appetite for raw materials and, like the human one, it tends to increase with eating. Certainly the momentum of increase in consumption is awe-inspiring and implies great problems ahead. As a vast consumer rather than a producer of these materials Europe has a two-fold cause to be pre-occupied: firstly on the global score of exhaustion: and secondly on the more local one of reliance upon others. Here too community policies in economy of use; in the search for alternative sources; in replacement are likely to be of immense importance. Once again nationally based policies reveal their inadequacy: continentally devised policies will need to be evolved to fit into global ones.'

Mr. Davies was in Hamburg to open the British Trade Week which began there on September 17 (see page 604).

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MIDDLE EAST MARKETS — 2

Iran—land of a famous past and a brilliant future

by J. C. Cloake, Commercial Counsellor, British Embassy, Tehran

IN OCTOBER Iran will be celebrating the 2,500th anniversary of the foundation of the Persian empire by Cyrus the Great. Twenty-five centuries ago this great ruler provided secure and stable government, developed highways and postal services, encouraged trade and issued a proclamation of human rights. For 25 centuries Iran has preserved and developed its rich culture, conquered its conquerors and steered its way through periods of internal strife and external threat, to emerge as a strong, prosperous and forward-looking nation now once again blessed with a stable and enlightened government, developing communications and booming trade.

There can be no greater mistake than to regard Iran either as a minor and distant corner of a general Middle Eastern market, or as a land of carpets, caviar and oil wells just worth a day's stop-over on the way to and from India or the Far East; but the mistake has too often been made. Iran is a big market in its own right: a big country (its area equal to that of the EEC, plus the UK, Ireland, Denmark, Switzerland and Austria) with a population which, if smaller than that of the major industrialised countries, is still two and a half times that of Australia, spending, in 1970, £25 per head on civil imports. Above all it is a country, and a market, with a huge potential.

The Iranian market

Iran's civil import bill for the year 1970, according to Iranian official statistics, totalled £750 million. Imports have doubled in five years; they may well double again in three more. The present pattern of these imports shows clearly the stage of Iran's development: less than 10 per cent are consumer goods, over 25 per cent are capital goods, the remaining two-thirds are raw materials, semi-manufactures and components. The most important classes of imports in 1970, by broad headings,* were:

machinery and parts (non-electric)	£168 million
base metals and metal manufactures (mostly iron and steel)	£166 million
chemical materials (including pharmaceutical, photographic, dyes etc.)	£77 million
electrical machinery and equipment	£69 million
vehicles of all kinds and components (mostly components)	£68 million
textiles (mostly fibres—wool and artificial)	£56 million

RECOMMENDED EXPORTS

Items which should achieve success at present in the Iranian market are: heavy construction equipment, communications and electronic equipment, medical and scientific supplies, industrial chemicals and raw materials, food processing equipment, packaging machinery, electrical machinery, metal-working machinery, plastics machinery, textile machinery, vehicle components/accessories and livestock. Industries whose need for manufactured goods is likely steadily to increase are: oil, mining, secondary metal manufactures, water and power.

Military imports, which are substantial, are not shown in these published Iranian figures; the overall shares of the market can better be seen from comparison of the supplying countries' export figures. These show the USA slightly in the lead for 1970 with £136 million, West Germany second with £134 million, Japan third with £74 million and the UK fourth with £66 million.

The main exports from the UK to Iran in 1970 were:

transport equipment and parts	£20.6 million
machinery and parts (non-electric)	£15.5 million
chemical products	£6.6 million
electrical machinery	£6.0 million
iron and steel	£4.4 million

while exports of other metals and metal manufactures, textiles and textile fibres, and scientific instruments were also considerable.† Important military orders have also recently been placed by Iran with the UK.

The four countries mentioned above have, between them, for long provided some two-thirds of Iran's imports. But lately the shares (for civil imports) of the USA, Germany and the UK, and of some other major suppliers such as France, have been slipping as more countries realise the potential of the Iranian market. The greatest growth patterns are shown by Japan and the Soviet Union (which have moved in 1970 into third and fifth place at the expense of the UK and France respectively) but many smaller suppliers, notably India and Romania, are

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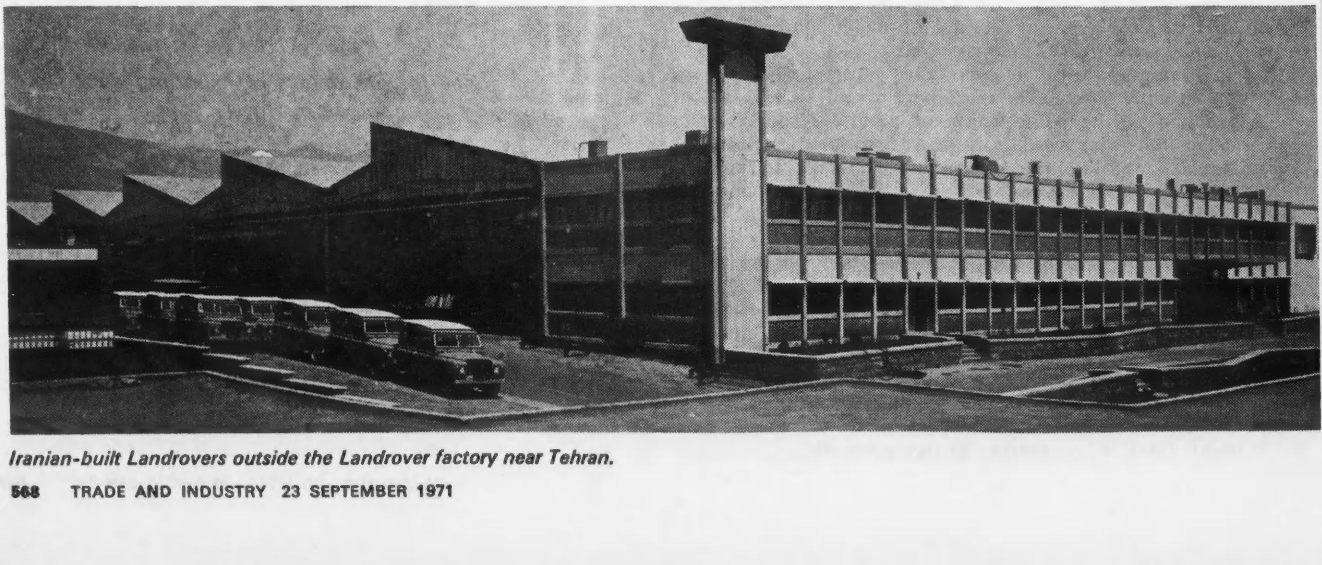
* Iran does not use the Brussels Tariff Nomenclature, but may adopt it during 1972.

† Further details both of UK exports and of Iran's imports by tariff classification and source country can be obtained by reference to the DTI Library in London.



Iranian-built Landrovers outside the Landrover factory near Tehran.

THE BANK OF IRAN AND THE MIDDLE EAST

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TEHRAN BRANCHES
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PROVINCIAL BRANCHES
Khorramshahr, Abadan

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RAN
continued

moving up fast, helped in some cases by barter and bilateral trade and payment agreements. This diversification of sources of supply is perhaps inevitable, but there should be room, in an economy expanding so fast, for all comers. There is certainly considerable room for the UK to improve its present performance. A determined sales effort by British firms with the right kind of products to offer (whether or not they are already established in the market) should achieve a greater share of Iran's imports. But it goes without saying that prices, deliveries, credit terms and service must all be competitive; the British trading image has suffered particularly badly from delivery delays in recent years.

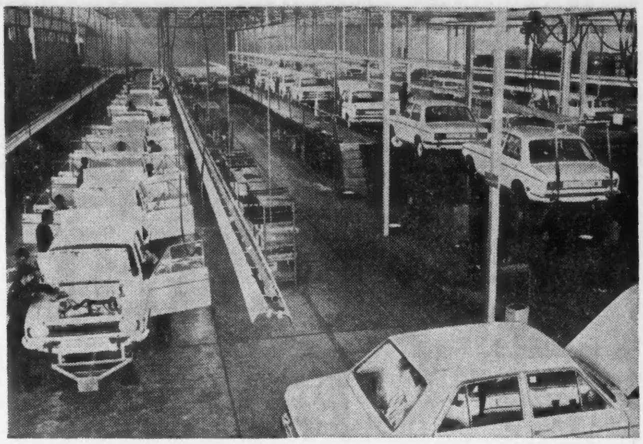
Natural wealth and planned development

Iran is worth the export effort, not merely in terms of its present market but also of its potential. The country enjoys political stability under the progressive leadership of the Shah, HIM Mohammad Reza Pahlavi, whose White Revolution of the Shah and the People has done much to improve the condition of the people. It also enjoys economic stability and natural riches.

In 1970 Iran was the leading producer of oil in the Middle East. The oil revenues, which still derive mainly from the Western-based Oil Consortium (BP have a 40 per cent interest; Shell 14 per cent), although the new companies established in direct partnership with the National Iranian Oil Company are making an ever-increasing contribution, have received an immense boost as a result of the five-year agreement reached in Tehran in February between the Persian Gulf oil-producing states and the international oil companies. Iran's oil revenues are expected to amount to some £775 million in the Iranian year 1350 (March 1971-March 1972), compared with some £550 million last year and £200 million five years ago.

These oil revenues are put to good use by the Iranian Government which allocates 80 per cent of them to the development budget, administered by the Government's Plan Organisation. By a series of Five Year Plans remarkable social, economic and industrial progress has been achieved in a short time. The present Fourth Plan began in March 1968, budgeting for development expenditure of about £2,000 million in the public sector and forecasting almost matching developmental expenditure in the private sector. Although cost escalation on major projects, together with extra defence expenditure, caused some budgetary and foreign exchange tightness in the last two years, the increased oil revenues should now permit the full realisation of both civil and defence programmes. The average annual growth (at constant prices) in GNP was planned to be 9.4 per cent in the Fourth Plan period, and this figure has been well surpassed so far. The main emphasis in previous plans has been on infrastructure and industrialisation. The Fifth Plan, now under consideration, while continuing this programme, is likely to put an increased emphasis on social services, regional development and agriculture. The development of agriculture which, despite the progress of industrialisation, remains the livelihood of the majority of Iran's population, has lagged behind—a long drought, especially severe in the last two years, has not helped.

British firms have participated in many of the Fourth Plan's major development projects, including the natural gas pipeline from South Iran to the Russian border; country-wide power transmission systems; electrification of medium-sized towns; a thermal power station; modernisation of airports. Major projects in these fields will undoubtedly figure in the Fifth Plan. They, together with mining, water supply, agro-industry and education, should offer good prospects for British participation.


The assembly line at the Tehran factory where the Iranian Peykan car, based on the British Hillman Hunter, is produced.

LINE OF CREDIT

Under an agreement signed on June 4, 1970, between the Central Bank of Iran and Midland Bank/Morgan Grenfell, a £25 million facility has been provided for financing the purchase by Iranian importers of a wide range of British capital goods and associated services on favourable terms. The line, which has not yet been fully utilised, is available up to December 4, 1971, though an extension to June 4, 1972, is likely.

Oil is not the only natural wealth of Iran, nor the only contributor to the country's foreign exchange earnings. The years 1970-1980 have been designated as 'Export Decade' and strenuous efforts are being made to expand Iran's non-oil exports. Traditionally, these have been carpets, cotton, dried fruit and mineral ores. The products of Iran's new industries, from cars to chemicals, are now beginning to figure in the accounts. Iran's non-oil exports in the first four months of this Iranian year show an increase of nearly 20 per cent over the corresponding period last year, and a steady increase over the next few years is expected. In particular, Iran's wealth of metallic minerals is just beginning to be discovered and exploited. The export of metals, especially copper, could become a major source of foreign exchange earnings.

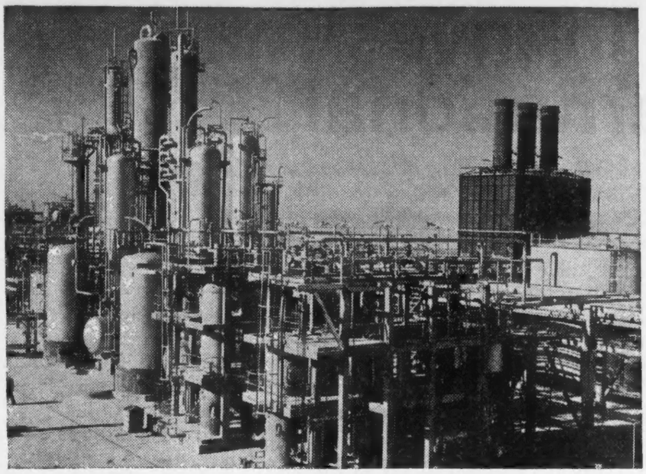
Industrialisation

Iran has been pursuing a vigorous policy of industrialisation, both in the public and private sector. Its pace of development is second only to that of Japan.

Major undertakings have been launched in the public sector, either as partnerships between a Government corporation and a private foreign company or as 100 per cent Iranian Government-owned ventures developed with technical assistance and credits from the Eastern European countries (often in exchange for oil, natural gas or other Iranian exports). But wherever possible, private sector joint ventures are encouraged. Government funds are available (through banks) to help these ventures, and even greater help is channelled through the private sector Industrial and Mining Development Bank, which draws largely on the World Bank for its funds.

Important public sector joint ventures include the new oil companies mentioned above (with a wide range of foreign partners), an aluminium smelter at Arak and several petrochemical plants in the South of Iran (all USA) as well as joint ventures for the exploration and potential exploitation of copper (with British and French partners). Of the Eastern European projects, the most important are a large integrated basic steel plant near Isfahan and a heavy engineering plant at Arak (both USSR); a machine-tool plant (Czechoslovakia) and a tractor factory (Romania), both at Tabriz.

In the private sector, British firms have assisted in the establishment of several new industries in the last three years. Important examples include Iran's first paper-making plant (Reed) and a strip and pipe mill (BSC), both on an engineering and management basis; and joint ventures for an industrial diesel engine factory (Dorman) and an automotive diesel factory (Leyland) both at Tabriz, a plant at Qazvin to manufacture high tension cable (BICC), and an agricultural project in Khuzestan (Shell and Mitchell Cotts). For years before, British firms had already participated in Iran's industrialisation, the first being Aladdin, who are now exporting from Iran to Western Europe



The natural gas liquids refinery at Bandar Mah Shahr, largest of its type in the world, engineered by Humphreys and Glasgow Ltd.

and the USA. The biggest single project so far has been the collaboration with the Iran National Company for the production of the Iranian Peykan car, based on the Hillman Hunter, of which 30,000 units are now rolling off the lines annually. There are several important new Irano-British joint ventures under current negotiation.

There remains wide scope for British participation in Iran's future industrialisation plans. Iran is set resolutely on the road to further industrialisation—especially in lines auxiliary or complementary to its major steel, petrochemical, vehicle etc industries—not only to satisfy internal needs but also to increase export earnings. Indeed, export earning potential has now become a major criterion for the approval of new industrialisation projects. With this proviso, the Iranian Government welcomes foreign participation in new industry, particularly in the form of investment and especially when that investment is allied to management know-how and training. A special law guarantees protection for industrial investment; and the Iranian Government normally gives some protection to local industry, at least in its critical early years, and harbours foreign exchange by excluding imports for which there is an available domestic substitute.

In these circumstances, the advantages to the foreign investor in joint venture local manufacture are: positively, the likelihood that the joint venture will obtain a far higher share, if not a monopoly, of the domestic market; and negatively, averting the danger of losing altogether an existing export market. In certain cases there may also be prospects of achieving exports from Iran which cannot be achieved directly from the home country.

Fields in which the Ministry of Economy is currently trying to attract foreign investment include petrochemicals, pharmaceuticals, vehicle components, metal products, heavy electrical equipment and agro-industry.

A changing pattern

As Iran industrialises, the pattern of imports changes. A small trade in finished goods can become a large trade in components. The export of consumer goods to Iran has already, save for some speciality lines, been largely replaced by the sale of plant and machinery to make such goods and, as appropriate, of raw or semi-processed materials. The British exporter must keep a jump ahead. As Iranian industry becomes more sophisticated, there will be increasing opportunity for the sale of items such as electronic and control equipment, which are unlikely to be manufactured locally for some time. For example, where yesterday we sold textiles, we are today selling textile machinery and fibres. Tomorrow, we should sell machine tools and components to make textile machinery (and participate in its manufacture), and sell the equipment to control both the machinery and the tools.

There is, in the longer run, the possibility of a further opportunity. This may arise once again in the field of consumer goods as the standard of living of the Iranian people steadily increases and as protection for local industry and controls on the expenditure of foreign exchange are eased.

Britain a good market for foreign investment

THE prospects for investors in Britain are good, said Mr. John Davies, Secretary of State for Trade and Industry, speaking on September 13 to the United States Fund Managers' Conference at the Savoy Hotel, London.

'It is the Government's firm intention,' he said, 'to create a framework which will provide industry with ample opportunity to expand on a sustained basis. There are signs that the long slowdown in economic activity is coming to an end and that business confidence is recovering. Americans are in a good position to share in this upsurge by reason of our common language and cultural links. The imminent prospect of our joining the EEC will give us a home market of 300 million people. This large scale market will be eminently suited to the advanced technological and highly skilled managerial techniques of American firms. We have a steady supply of skilled labour, together with environmental and cultural amenities second to none.

'International flows of investment funds can benefit both the country receiving such funds and the country providing the capital. This is true whether one considers direct investments by companies outside their home country, or investments by individuals and institutions seeking to widen and improve their portfolio by investment abroad. And while it may be necessary in certain circumstances to take appropriate short-term measures to stop speculative flows of currency this does not mean, certainly so far as the UK is concerned, that our attitude towards genuine inward investors has changed.

'The UK, like the US, has a much higher total value of private investment abroad than investment from overseas in the home country. But there is a well-known difference in pattern between the two countries' overseas investments: the US has a much higher proportion of direct investment overseas and a relatively small proportion of portfolio, whereas in the UK there is more nearly a balance between the two.

'Is it that the UK financial community is more outward-looking than the US? If so, then this conference will help to improve US knowledge of the UK market, and if that should lead to an increase in US portfolio investment in the UK, we would welcome it.

'There are a number of factors which make Britain a good market in which to invest.

'Firstly, there is the nature of the market itself. A wide range of quoted shares on our stock exchanges and a high turnover in these shares, makes for a ready market when buying or selling. There is plenty of professional investment advice available. Stock exchange transactions in the UK are not subject to legal control, as in the US, but are well regulated under the Exchanges' own rules.

'Secondly, our Company Law requires standards of disclosure about the affairs of all limited companies; shareholders and potential investors can therefore obtain reliable financial information about companies.

'A third and most important factor is that the UK economy is now set on a growth path which will be sustained and reinforced on our entry to Europe.

'Leaving aside the prospects for the UK economy and the impact on it of entry into the EEC, Mr. Davies pointed out that in any case 'many British companies depend, to a much higher degree than their US counterparts, on exports and other sales outside the home market. The profitability of these companies is not therefore geared to the growth of the UK market or their performance in it. If you look at British based multinational companies you will find that they often have a higher proportion of their sales and assets overseas than do US multinationals.'

Mr. Price in Zurich

MR. David Price, Parliamentary Under-Secretary of State for Aerospace visited Zurich from September 20-21, to see the special retail promotions being staged as part of the 1971 British Trade Drive in Switzerland, organised jointly by the British Embassy, the Department of Trade and Industry and the BNEC Export Council for Europe. He took the place of Lord Drumalbyn, Minister without Portfolio at the DTI, who was indisposed.

ECGD—new roles in investment insurance and international relations

DEVELOPMENT of policy in the Export Credits Guarantee Department is, as in most financial institutions, an evolutionary process, ECGD Secretary, Mr. Robert Fell, told a conference in London on September 14. Mr. Fell was taking part in a four-day conference held in conjunction with the Financing for International Trade and Export Services Exhibition at Olympia.

'I see two streams to evolution. The first is the continuous adjustment to market demands—a form of development that is perhaps only noticed over time. The other stream in evolution springs from the occasion from time to time when a special spurt is given to the process of evolution or there is a break in the orderly chain, starting an entirely new stream of development. ECGD is experiencing both sorts of evolution at this point of time, and perhaps we can take them in order.

'In the main stream of evolution we are gaining in experience all the time—though in the longer-term field there is a wait of many years before we have any results to relate to the decisions of our underwriters. Nevertheless we are gaining experience: and this of course benefits our clients, since we seek no profit. In all our underwriting we are seeking a balance between cover so lax that we suffer avoidable losses—which are ultimately reflected in the premium we quote; and cover so hedged about with limitations that the exporter either loses the business or is unreasonably exposed to risks we will not cover.

'As we have become more skilled—and as we have had the benefits of an expanding turnover—we have been able to give fuller cover without sending premiums up—or conversely to give cheaper cover without affecting its quality. Since 1954 our short-term rates have been cut on average by 58 per cent, whilst over that period the scope of the cover has been substantially improved—in terms, for example, of percentage of cover, shorter waiting periods on claims, and so on. This leads directly to the question: will that beneficial progress continue—or are we now pretty well stabilised at the current position? The latter is much the better bet. This is because our evolution has not been taking place in a fixed environment.

'We know much more now about controlling our losses on political risks. So far as these arise from currency shortages, the world as a whole has learnt more about avoidance of such situations, and has developed its capacity for rescue operations. Indeed perhaps a greater risk in many areas is the more truly "political" risk, the sort of risk that can arise, for example, from the overthrow of a regime. Unfortunately, any improvement here has been counterbalanced by increasing problems on our buyer risks, for which claims have been growing substantially higher in recent years. And of course these claims are usually a total loss, whereas on exchange delays we usually expect to get the money back in the end.

'This situation is not due to any faults in our underwriting, and if we set ourselves to control it by more restrictive underwriting we should be cutting off a lot of desirable and usually in the event sound and profitable business. So we have to live with it.

'The reasons for this are not obscure. Across the world business has become more fiercely competitive: and insolvencies are an important way in which the commercial world eliminates the inefficient. Add to this the increasing commercial sophistication which, under the spur of competition, develops a credit-based commerce. And take account of the rapid increase in imports by many "new" countries, and the ease with which new and inexperienced importers can be drawn into the vacuum of experienced merchants left by this increase, you will not be surprised that things are as they are.

'I would like to come back to the point that our trouble—which is shared by similar organisations abroad—is not the result of imperfect underwriting; nor of any falling off in our status information services. Status inquiries can—and generally do—identify buyers with a poor record of business behaviour—as well as the fraudulent, of course. They will usually, too, alert us to the firm known to be in financial straits.

'What no status service can be expected to do is to give us a foolproof credit assessment of every buyer. Let me illustrate what I mean. In this country we have the example of large companies whose failure has taken even their own merchant bankers off their guard; indeed, we have examples of companies which did not themselves realise the grave trouble they were heading for. Now look at it from the point of view of a foreign credit insurer: would you expect *him* to have known more? So this is a change in world trading conditions that we must live with. It is a change which leaves us with problems.

'Other changes, however, produce opportunities, by creating new demands. There has, for example, been the expansion of buyer credit financing in recent years, and this is a change which is still on the move. We began, in 1961, right at the top end with Financial Guarantees. Now we have come some way down the scale so that for a range of substantial capital contracts the parties have a free choice between the supplier credit and buyer credit systems. And as we feel our way and train more staff in the new procedures, there is no doubt that we shall come further down the scale. There is of course a point beyond which one cannot envisage a spread of this option: where either in terms of contract value or of length of credit the detailed work involved is excessive, for the advantage to buyer or seller over the existing supplier credit system.

Room for expansion

'There is also plenty of room for expansion in lines of credit; this will come, I think, as foreign governments and utilities acquire more experience in this field—and of course as we get more experience in negotiating and operating lines of credit, and in identifying opportunities for them. And of course the banks can play an important part in initiating lines of credit, rather than merely coming in later to operate them; and it is clear already that this is a prospect they are well aware of.

'I think also that we shall have more demand from exporters for buyer credit facilities as they discover the advantages of our being drawn more directly into the negotiations of the credit side of their contracts. The rate of advance into new fields is to some extent dependent on the staff at our disposal: this is not, of course, just a question of numbers, but of having people with the acceptable level of specialist skill—which in these particular new fields is pretty considerable. We are dealing in some very large sums of money, and we simply cannot afford to dilute the competence of our negotiators and decision-makers. The banks, of course, have been having a similar problem in the export financing field, though I think in less acute a form.

'I said earlier that we had to strike a balance between a willingness to cover any risk in the interests of export promotion, and an over-cautious policy of making sure that we as an institution are safely based. There is a similar balance to strike between the willingness to spread our efforts to help any would-be exporter, and the benefit of concentrating our support behind experienced exporters, whose increment in sales could be of far more benefit (particularly in the short term) both in national terms and in terms of premium income. There has been a welcome change in the British export scene over the last decade. It is now fully recognised that exporting is a professional

(continued on page 574)

Addresses of ECGD Local Offices

The Export Credits Guarantee Department (ECGD) is a Government Department providing export credit insurance for United Kingdom exporters. Its object is to provide on a self-supporting basis, the cheapest form of export credit insurance possible. Total business declared for the Financial Year 1969-70 was £2,696 million. The Head Office of ECGD is at Aldermanbury House, Aldermanbury, London, EC2P 2EL. Tel. 606 6699, Telex 883601. The Department's local offices are as follows:

London (City)
London postal districts E., and E.C.2 and 3, and the county of Essex.
J. V. Baker, Marlon House, 71-74 Mark Lane, London EC3R 7HS. Tel. 488 3491. (Code: 01-488 3491) Telex 886888.

London (South)
London postal districts of E.C.4, S.E.1-27 and S.W.1-20. Counties of Kent and Surrey (Greater London Council Area only).
G. L. A. Link, 42-46 Weston Street, SE1 3QN Tel. 407 5011. (Code: 01-407 5011) Telex 888575.

London (North)
London postal districts of N., E.C.1, W.C.1 and 2, County of Hertford and Middlesex (part GLC area only).
D. A. Green, 1-4 Old North Street, Red Lion Square, WC1R 4TE. Tel. 405 8991. (Code: 01-405 8991) Telex 2633615.

London (West End)
London postal district N.W. and W. Middlesex (part GLC area only).
D. G. Hake, Waverley House, 7-12 Noel Street, London, W1V 3PB. Tel. 1-437 2292. Telex 24105.

Bedford
Counties of Bedford, Cambridge, Huntingdon, Norfolk, Suffolk and Northamptonshire.
M. J. Crane, Heron House, 49-51 Goldington Road, Bedford. Tel. Bedford 58798 (Code: 0234 58798) Telex 82350.

Belfast
The six counties of Northern Ireland.
R. H. Forsyth, Scottish Provident Buildings, 7 Donegall Square West, Belfast, BT1 6JE. Tel. Belfast 29428. (Code: 0232 29428) Telex 74577.

Birmingham
Counties of Shropshire, Hereford, Worcester, Warwick, Merioneth, Montgomery, Radnor and Stafford.
B. T. Clark, Chamber of Commerce House, Harborne Road, Birmingham B15 3DL Tel. Edgbaston 4375. (Code: 021-454 4375) Telex 33132.

Bradford
The West and North West of the West Riding of Yorkshire (excluding Barnsley, Harrogate, Otley, Pudsey, Ripon, Wakefield and Yeadon).
F. Wilmot, West Riding House, Cheapside, Bradford, BD1 4LG. Tel. Bradford 25147. (Code: 0274 25147) Telex 51161.

Bristol
Counties of Gloucester East of the Severn, Wiltshire, Dorset, Somerset, Devon, Cornwall and the Channel Islands.
W. D. Begg, Washington House, Great George Street, Bristol, BS1 5QL. Tel. Bristol 22102. (Code: 0272 22102) Telex 44248.

Cardiff
Gloucester West of the Severn, Cardigan, Brecon, Pembroke, Carmarthen, Glamorgan and Monmouth.
G. H. Turl, St. David's House, Wood Street, Cardiff, CF1 1ES. Tel. 26657. (Code: 0222 26657) Telex 49284.

Crawley
Counties of Surrey (excluding area covered by GLC) and Sussex.
F. R. Burge, Barden House, 36 Spencers Road, West Green, Crawley, Sussex. Tel. 23444. (Code: 0293 23444) Telex 87374.

Edinburgh
The counties of Angus, Berwick, Clackmannan, Dumfries, Fife, Kinross, the Lothians, Peebles, Roxburgh and Selkirk.
J. S. Anderson, 108 George Street, Edinburgh, EH2 4LN. Tel. Caledonian 3004. (Code: 031-225 3004) Telex 72170.

Glasgow
The counties of Aberdeen, Argyll, Ayr, Banff, Bute, Caithness, Dunbarton, Inverness, Kincardine, Kirkcudbright, Lanark, Moray, Nairn, Perth, Renfrew, Ross and Cromarty, Stirling, Sutherland, Wigtown and the Orkneys, Shetlands, Western Isles and Hebrides.
R. H. K. Hughes, 7 West George Street, Glasgow, C.2. Tel. Central 3056. (Code: 041-CEN 3056) Telex 77130.

Leeds
The East and North Riding of Yorkshire (excluding the area North of a line from Yarm to Staithes). The East and North of the West Riding of Yorkshire (including Goole, Harrogate, Otley, Pudsey, Ripon, Wakefield and Yeadon).
W. A. Luxton, Headrow House, 42 The Headrow, Leeds, LS1 8HD. Tel: Leeds 30082. (Code: 0532 30082) Telex 55232.

Liverpool
The Welsh counties of Anglesey, Caernarvon, Denbigh and Flint: parts of Lancashire and Cheshire (including Wigan and Warrington) and the Isle of Man.
J. M. Foster, Number One Old Hall Street, Liverpool, L3 9HJ. Tel. Central 5756. (Code: 051-236 5756) Telex 62537.

Manchester
Parts of Lancashire and Cheshire (excluding Wigan and Warrington) and parts of Derbyshire.
W. Ford, Cheshire House, 18-20 Booth Street, Manchester, M2 4AJ. Tel. Central 8861. (Code: 061-CEN 8861) Telex 667756.

Newcastle upon Tyne
Counties of Northumberland, Durham, Westmorland and Cumberland; part of North Riding of Yorkshire, including Middlesbrough, Redcar and Thornaby-on-Tees.
R. A. Bounds, 2 Osbourne Road, Newcastle upon Tyne, NE2 2BL. Tel. Newcastle 814214. (Code: 0632 814214) Telex 53305.

Nottingham
Counties of Leicester and Rutland, and parts of the counties of Nottingham, Derby and Lincoln.
A. E. Beedle, Equitable House, Old Market Square, Nottingham, NG1 2LE. Tel. 46585. (Code: 0602 46585) Telex 37566.

Reading
Counties of Berks, Bucks, Hants, Oxford and West Middlesex.
K. I. Humphrey, 18 The Forbury, Reading, RG1 3EJ. Tel. Reading 580577. (Code: 0734 580577) Telex 84422.

Sheffield
The Southern triangle of the West Riding of Yorkshire (including Barnsley), and parts of the counties of Nottingham, Derby and Lincoln.
W. K. A. Oxley, 8-12 Furnival Gate, Sheffield, S1 4QN. Tel. Sheffield 29151. (Code: 0742 29151) Telex 54244.

New York
In the United States exporters can obtain assistance from the Department's resident representative for the United States and Canada.
J. A. Dorrain, DFM, 150 East 58th Street, New York, 10022, USA. Tel. 593 2258. Telex 420543.

NEW ROLES FOR ECGD

continued

job: in ECGD we are reflecting that change. We do not intend to desert the new and the weak, but just as export promotion is no longer a matter of exhortation so our resources, which are not unlimited, will be organised to give maximum support where it can be most effective and rewarding.

'This, I think, brings me naturally to the entirely new business of overseas investment insurance. It might be thought that this is an irrelevance to a body not of investors but of exporters: but that is not so. Exporting depends on selling, and selling in turn on marketing. Many exporters can market overseas without investing overseas; but for others some of the most effective means of marketing involve investment. For example many industries—the motor industry is one—depend on the establishment of effective nationwide networks of distributors with adequate service facilities. Sometimes these can be discovered and franchised without undue difficulty; sometimes with difficulty; and sometimes not at all. Where some investment is necessary towards the establishment of an efficient and adequate dealer network, the availability of effective insurance for the investment could alter the position. This is just one example.

'I would like to suggest that where there is a *prima facie* prospect of using investment insurance, companies ought to be starting their studies now. This is not such obvious (or patronising) advice as it sounds. When we introduced our short-term bank guarantees, and wrote to exporters months after there had been all the talk about them, we got a very slow response from many firms: they only began their thinking when they got our letter. If investment insurance does interest you, I suggest you look out for the reports from Parliament in the autumn when our Ministers will be outlining our scheme as they go for the necessary powers.

Accession to EEC

'Another natural break in the chain lies in our accession to the Common Market. There are three points here which I will only touch on. The first is the need to "harmonise" our facilities with the other credit insurers of the Common Market. We should not exaggerate the progress the Six have made in this field, but nevertheless their progress towards a common form of policy has been considerable, particularly for longer-term business. If Britain joins the Common Market we shall find, therefore, that after a transitional period our cover will have to be modified to conform in various respects to that of the other members. The point which has been made in general can I think be made with particular force over credit insurance, however: that once we are in we shall have a voice in what is decided for the future. ECGD has the largest turnover, and enjoys a considerable reputation, so that I would expect what we say to carry considerable weight.

'The second point follows from this. Internationally we take it as a main aim of policy to curb a senseless credit race. We have as our international instruments the Berne Union and the OECD. Once we are a part of the Six, the combined voice will be very strong indeed. And in the international forums we should play a very effective part in shaping sensible international agreements with the other main exporting nations.

The Minister for Industry, Sir John Eden, who recently attended the launching by Gestetner Ltd., of a plain paper copying machine, was presented with a duplicate photograph of himself by Mr. David Gestetner (right). Sir John congratulated Gestetner on exporting 80 per cent of its production—27 per cent to the Common Market.

'Then, looking ahead, and perhaps a little longer than some think now, there will be the effect of new trading patterns in Europe resulting from the widening of the EEC: and new patterns or risk. But that is perhaps moving from immediate practical affairs into the realm of speculation. I do no more than put up the marker.

'With the staff increases necessitated by our new roles in investment insurance and in international relations, we are taking the opportunity of regrouping our whole organisation. In future we shall have three Under-Secretaries, who will act as my deputies each in charge of a group of Divisions (see chart below). These immediate regroupings are made necessary by expansion. You will also have read that our organisation is being looked at in detail by a team of Governmental and outside management specialists, under Mr. D. G. Scholey, a member of our Advisory Council. I am sure it is a tonic process for every organisation to be looked at in this way with a fresh eye from time to time, and that we shall gain much from it.

'I have tried in this talk to cover the various fields in which things are changing round us, and we are changing ourselves. No organisation of this size can be perfect in every single action, but I believe that our facilities still compare very favourably with those of your competitors, and I shall do everything in my power to keep things that way.'

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Britain needs the large market base of the EEC

—Lord Drumalbyn

THE remarkable growth of the EEC and the need for large European companies were discussed by Lord Drumalbyn, Minister without Portfolio, when he opened the Annual Conference of the Institute of Chartered Secretaries in Birmingham on September 16.

'While there are of course bound to be some adverse effects such as the so-called costs of entry, only a relatively very small improvement in our competitive strength would be required to match those costs,' said Lord Drumalbyn. 'Membership of the enlarged Community will give us preferential access to our largest and fastest-growing market. As Community members have shown, the benefits are greater for members than for outsiders. It is estimated that by 1969 the value of trade between the Six in manufactured products was 50 per cent higher than it would have been had the Community not been formed. This stimulus seem to be continuing. And in addition their trade with the outside world has also increased much faster than ours.

'The performance of the USA, Japan (with twice our population) and the European Community shows that complex industrial nations like Britain, making the whole range of capital and consumer goods, need the base of a very large integrated market if they are to prosper. It is significant that the rate of growth of manufacturing output per head in the five major Community countries, which had already been at a generally high level in the 1950s and early 1960s, showed a further marked increase in the latter half of the 1960s, with the one exception of Italy, where however their earlier remarkable record was almost maintained.

The multinational company

'What of multinational companies in the context of our joining the EEC? One of Europe's needs is unquestionably for more commercial and industrial undertakings able to match the size and competitive power the giant undertakings of America, Russia and Japan. This need is particularly urgent in high technology sectors of industry such as aircraft, computers and nuclear power.

'The Community has only recently set out on the long road towards establishing a Common Industrial Policy designed to promote free competition within the Common Market and to strengthen European industry. One important aim is to encourage the necessary restructuring of industry to encourage European companies to take full advantage of the opportunities provided by the large market of the Community. With this object in view the Community is anxious to make it easier for companies to expand to their optimum size; for example by merging at both the domestic and the Community level. Indeed, the Commission is particularly anxious to see mergers in the private sector across national frontiers within the Community.

One major initiative

'The creation of European companies is one major initiative which would help to remove the psychological objections to mergers between companies from member states, if only because each would belong to a truly international organisation. None of its component parts would then feel that they were under alien domination. Other proposals under consideration to encourage such mergers include a wider use of the European Investment Bank, the use of Community development contracts, particularly in advanced technology sectors, and the creation of a Community agency to advise small and medium firms on the possibilities for collaboration or merging.

'Because of the complexity of the subject, the Community's work on industrial policy has advanced slowly; it is still in its infancy. That is fortunate for us. Membership will enable us to play a full and effective part in the evolution of that policy. The Community, we know, welcome the immense experience and expertise in the commercial and industrial fields which we are able to contribute.'

Mr. Ridley signs Protocol

A PROTOCOL was signed on the fulfilment so far and further development of co-operation between the Czechoslovak Socialist Republic and Britain on September 16, which ensues from the Agreement concluded between the Government of the Czechoslovak Socialist Republic and the Government of the United Kingdom of Great Britain and Northern Ireland on co-operation in the field of Applied Sciences and Technology. The Protocol was signed on behalf of the British side by Mr. Nicholas Ridley, Parliamentary Under Secretary of State, Department of Trade and Industry, and on behalf of the Czechoslovak side by the Czechoslovak Deputy Minister for Technical and Investment Development, Dr. Antonin Mrazek.

During his visit to Czechoslovakia Mr. Ridley had discussions with representatives of Federal and Slovak National Ministries on the possibilities for the further development for scientific, technical, industrial and economic co-operation. He also visited the International Engineering Fair in Brno and the Slovnaft National Enterprise in Bratislava.

Export award for small manufacturers

The British National Export Council is repeating for the third successive year the BNEC Export Award for Smaller Manufacturers in recognition of the important contribution which smaller firms make to Britain's export drive. Five Awards, which are designed to recognise the achievement of the staff as well as the firm, provide an opportunity for a nominated representative from the shop floor or office of each winning firm, plus his or her wife or husband, to travel overseas on a group tour organised by BOAC. This year, the tour is to Canada, the United States and Bermuda. As in the previous year, the competition is open to manufacturers employing fewer than 200 people. Exports of applicant companies must have topped £50,000 in the year to March 31, 1970, and £100,000 in the following year. Each winning company will receive the BNEC Export Award trophy (designed by Mr. Richard Negus) and a certificate at a presentation at the Savoy Hotel, London, next March 16.

Two more Bolton studies

Two further research studies commissioned by the Bolton Committee of Inquiry on Small Firms have been published. They are *The Small Firm in the Road Haulage Industry* by Brian T. Bayliss and *Scientific and Engineering Manpower and Research in Small Firms* by J. G. Cox. Four research studies have already been released by the Committee whose own report is due to be published later this year. The road transport study is concerned with the existence, or predominance when measured in numbers of operators, of the small operator in the road haulage industry and the reasons for that existence. The second report presents new data on the employment of scientists and engineers and R & D expenditure by small firms. It examines the degree to which small manufacturing firms (those with 200 employees or less) are in a position to benefit from and contribute to the technological advance of British industry.

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Britain's 1972 Denmark Trade Drive now well under way

DENMARK is currently our twelfth largest market—larger, for example, than Japan. Our sales there totalled £220 million in 1970, 147 per cent more by value than in 1960, which means that on average each Dane spends approximately £49 per year on British goods. This shows that many British manufacturers are well aware of Denmark's market potential; but worthwhile business opportunities still exist. Traditionally thought of as an agricultural producing country, Denmark has undergone a remarkable change in the last 10 years and exports of industrial equipment now earn twice as much for Denmark as do agricultural products. This growing industrialisation of the country coupled with rising consumer expenditure, are two of the chief factors which influenced the decision to hold a Trade Drive in Denmark next year.

Despite its size—about half the area of Scotland and with a population of just under five million—Denmark is a considerable trading power. It enjoys one of the highest standards of living in Europe and its import level per head of the population is the fifth highest in the world. Nevertheless the balance of trade between the United Kingdom and Denmark is not in our favour. Last year we bought from Denmark £55 million worth of goods more than we sold there, principally because of its importance as a supplier to our breakfast tables. One of the aims of the Trade Drive will be to reduce this adverse balance. To do this there will be a concentration on selected market opportunities, particularly capital goods, where there is both a continuing demand from Danish industry and also room for improving our export performance. The Trade Drive will take the form of exhibitions, store promotions, seminars and in some categories of goods, trade missions. Every effort is being made to ensure the success of this major export promotion, which is being sponsored by the Department of Trade and Industry in co-operation with British industry.

A new approach

The 1964 and 1968 events used new promotional techniques, and a new approach has also been planned for 1972. In particular, a careful study was made to select 'prime target' commodities for the Drive, in both the capital goods sector and to some extent for consumer goods.

Capital gods on the target list for the Trade Drive include textile machinery, equipment for the shipbuilding industry, packaging machinery, machine tools, scientific and electronic equipment for industrial use, hospital and medical equipment, mechanical handling and agricultural machinery and equipment. Promotional events which are likely to take place during the Trade Drive in connection with these product categories are a 'forum' and seminar on shipbuilding equipment in Aarhus in the autumn of 1972; participation in the Herning Agricultural Show in July; in the International Packaging Exhibitions in November in Copenhagen; in 'Intertool 72', an exhibition in Copenhagen at the end of October for machine tools and metal-working machinery industries; and in ELECTRONIK, another exhibition in Copenhagen in October 1972 covering the scientific and electronic equipment industry. British hospital and medical equipment will be promoted at the 8th International Congress and Exhibition on Clinical Chemistry to be held in Copenhagen in June 1972.

During the Drive, missions will be organised by both British and Danish industries and there will also be VIP missions from the Scottish Export Council and the Birmingham and London Chambers of Commerce. The objective is to bring together buyers and sellers of British capital equipment and, to this end, a detailed index by commodity of companies in Jutland and Fyn employing more than 75 has been completed.

Consumer spending power in Denmark, as elsewhere, has certain indentifiable priorities, and selectivity has involved matching these priorities to those sectors where we are doing well, but could be doing better. The commodities chosen for particular promotion are clothing; foodstuffs and beverages; hardware and household goods; cosmetics; footwear; carpets; toys and games; sports goods and leisure equipment. But this selection is by no means exclusive. Good opportunities may well exist for many commodities, which can be channelled, for example, through the department stores which are participating in the Trade Drive. However, in other retail outlets some attempt to limit the scope of activity would be made.

The participation of most of the Danish retail outlets is expected to be concentrated in May and October. Apart from gaining the co-operation of Denmark's leading department stores, the Commercial Department of the Embassy has developed especially close links with the head buying offices of chain stores and other retail/wholesale organisations with multiple outlets in Denmark. The support of these organisations, means that British goods would be promoted in all the major urban centres of Denmark without the need for British exporters to make direct contact with a multiplicity of separate retailers. Although a nation-wide British Week operation was not contemplated, special attention will be given to the retail outlets in Copenhagen, Aarhus, Odense and Aalborg. In these centres a number of independent retail outlets have been invited to participate in the Trade Drive in addition to the chain stores' branches. The specialist independent retailers so far selected do not necessarily represent a final list. It may well be possible to accommodate other firms in the four 'target' areas and British companies should not be deterred from putting forward additional names of firms to be considered for inclusion in the retail promotions.

In the same way British companies who have not, up to now, had any dealings with the main buying offices and wholesale organisations in Denmark will not be precluded from participation in the Trade Drive. There is, in fact, great scope for British companies new to the Danish market to make an initial impact during the Trade Drive.

In addition to the store promotions, Fairs and Promotions Branch of the Department of Trade and Industry are planning to mount a British Household Goods Exhibition at the Forum exhibition centre in Copenhagen under joint venture terms during the first week of May 1972. The exhibition will cover household goods of all kinds, including carpets and furniture and food and drink. This event is timed to coincide with the major part of the retail promotions and with the opening of the Tivoli Garrens which customarily attracts a large number of visitors to the captial. Participation in the exhibition will not be limited to those British manufacturers who already have links with the Danish market. As in the case of the retail promotions, 'new' exporters to Denmark will also be welcomed. Their aim should be to sell to wholesalers and retailers now so that their promotion in the stores can be linked to the Exhibition.

The Clothing Export Council will participate in the Spring and Autumn Fashion Fairs in Copenhagen and the British Footwear Manufacturers Federation is planning a special British Footwear Week in October 1972. It is hoped to involve all the footwear outlets in Denmark in this promotion.

Details of the consumer goods promotions are contained in a publicity leaflet available from the BNEC Export Council for Europe, 6-14 Dean Farrar Street, London, SW1H 0DZ. Tel.: 01-930 3121. Contact: N. E. Smith. Full information on the Trade Drive is also available at the Department of Trade and Industry from Fairs and Promotions Branch, Hillgate House, 26 Old Bailey, London, EC4M 7HU. Tel.: 01-248 5757, ext. 7207. Contact: B. Poole; and General Export Services Division, Export House, 50 Ludgate Hill, London, EC4M 7HU. Tel.: 01-248 5757.

Applications for reimposition of import duty

The Department of Trade and Industry, Tariff Division, have received applications for the reimposition of import duty from January 1, 1972, on the following items, which are at present temporarily exempt from duty:

Tariff heading	Description	Reference
29.04	2,3-Dibromopropan-1-o1 containing not more than 0.1 per cent by weight of 1,2,3-tribromopropane	13287
29.07	2,2-Di-(3,5-dibromo-4-hydroxyphenyl)propane	13504
29.15	Di(tridecyl)sodium-sulphosuccinate, mixed isomers	2224
29.16	Cyclandelate	1849
29.25	N-(n-butoxymethyl) acrylamide	13108
	α-chloro-*N*-*iso*propylacetanilide	13033
	N-(hydroxymethyl) acrylamide	—
29.30	1-Chloro-3-isocyanatobenzene	TIP 5261
	1-Chloro-2-isocyanatoethane	11998
	1-isoCyanato-4-fluorobenzene	TIP 3863
	1.4-dichloro-2-isocyanatobenzene	TIP 5259
	4.4′-diisocyanato-3.3′-dimethoxybiphenyl	—
	4.4′-Diisocyanato-3.3′-dimethylbiphenyl	—
29.35	2-amino-3-picoline	4128
	2-amino-4-picoline	4129
	6-amino-2-picoline	—
	2-bromothiophen	617
	2,3-lutidine	5361
	3-picoline	1834
	4-picoline	—
	2-n-propylpyridine	5282
29.45	Sodium methoxide	1668
39.01	Resins, being products of the condensation of adipic acid with a mixture of propane-1,2-diol and ethanediol of which the ethanediol content is not less than 50 per cent by weight, and having: (*a*) an acetyl value not less than 34 and not more than 38, (*b*) an acid value not more than 1, (*c*) a colour not deeper than 50 Hazen units, and (*d*) a viscosity at 40° centigrade of not less than 70 seconds and not more than 125 seconds, for a free fall of 20 cm. of a steel sphere ⅛ in. in diameter, in a tube of internal diameter 3.5 cm., when determined by the method of British Standard 188:1957, part 3, as amended up to and including September 1964	11343

Representations should be addressed to Tariff Division, Department of Trade and Industry, Brunswick House, 2 Central Buildings, Matthew Parker Street, London SW1 giving the respective reference shown above. Representations should be received by October 6.

UK minerals of economic importance

THE first of a series of booklets on minerals of economic importance to the United Kingdom deals with fluorspar. This mineral is mainly used in the production of steel and primary aluminium, but has many other applications including plastics, aerosols, refrigerants, polymers and fire extinguishing gases. United Kingdom production of fluorspar has more than doubled since 1963 and is now running at around 200,000 tons a year worth over £2 million. There is a sizeable export trade—£740,000 in 1969.

Fluorspar is included in the list of minerals covered by the scheme to assist mineral exploration which was announced by Sir John Eden, Minister for Industry, on July 8 this year. A number of British and overseas companies are now exploring for fluorspar in Britain. Details of the DTI scheme can be obtained from DTI at Thames House South, London, SW1.

The fluorspar dossier discusses the geological occurrence of the mineral and the existing and potential resources of it. It also deals with trends in production and the reasons for the rising demand which has stimulated new exploration. The dossier has been compiled by the Institute of Geological Sciences and is based on information gathered by the Mineral Resources Consultative Committee with the assistance of firms in the industry. It is hoped to publish in the coming months dossiers on other minerals which should prove a valuable factual basis for further study of the United Kingdom's mineral resources.

Fluorspar: Mineral Resources Consultative Committee is available from HMSO price 40p.

ADVERTISING IN *TRADE AND INDUSTRY*

Inquiries about advertising in *Trade and Industry* should be addressed to HMSO, Room D92, Atlantic House, Holborn Viaduct, London EC1P 1BN (01-248 9876 ext 6147).

Applications for temporary exemption from import duty

THE Department of Trade and Industry are considering applications for the temporary exemption from import duty of the materials listed below on the grounds that these materials are not made in this country or the Commonwealth or the supply available from these sources is not substantial having regard to the existing United Kingdom demand.

Representations are invited from manufacturers in this country or agents of Commonwealth manufacturers who consider they are, or will be within a reasonable period, in a position to supply a substantial proportion of the United Kingdom demand for these materials, or who are interested in their future production.

Temporary exemptions come into effect on the operative date of the Treasury Order in which the materials are specified and normally continue until the end of the current calendar year, when they are reviewed.

Interested parties who wish to make representations should address them to Tariff Division, Department of Trade and Industry, Brunswick House, 2 Central Buildings, Matthew Parker Street, London SW1, preferably through a Trade Association, giving the respective reference shown below and stating whether their names may be passed to the applicants for temporary exemption. Representations should be received by October 7.

Tariff heading	Proposed definition for tariff purposes	Applied for as	Exemption required until	Reference
29.31	*n*-Dodecane-1-thiol	Lauryl mercaptan (syn dodecyl mercaptan)	December 31 1971	13686
29.35	2-(3,4-Dichlorophenyl)-4-methyl-1,2,4-oxadiazolidinedione	2-(3,4-Dichlorophenyl)-4-methyl-1,2,4-oxadiazolidine-3,5-dione	December 31, 1971	13692

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Full details from: Lee Myers, Business Services International, 47 Upper Grosvenor Street, London, W1X 9PG. (01-493 8591)

Tariff preferences for developing countries

THE system of generalised tariff preferences agreed upon in the United Nations Conference on Trade and Development (UNCTAD), under which the developed countries will grant preferential tariff treatment to imports from developing countries, was described in *Trade and Industry* of March 24, 1971.

Details of the country and product coverage of the United Kingdom's arrangements which would apply subject to Parliamentary approval are given below.

On July 26 the Minister for Trade told the House of Commons that an Order will be laid later this year to bring the United Kingdom's new preferential arrangements into effect from January 1, 1972, and that the beneficiaries of our scheme initially at least will be the countries in the so-called 'Group of 77' in UNCTAD and dependent territories that are the present beneficiaries of the EEC scheme as well as developing Commonwealth countries not members of this Group.

The United Kingdom has reserved the right to withdraw or modify the preferential tariff treatment. The grounds for such action will normally be the import of a product in such increased quantities and under such conditions, as a result of the preference, as to cause or to threaten in the opinion of the United Kingdom Government serious injury to domestic producers of like or directly competitive products. Any industry which considers that it has suffered or is threatened with serious injury as a direct result of the preferential treatment of imports from developing countries is advised to get into touch with the Tariff Division of the Department of Trade and Industry, Brunswick House, 2 Central Buildings, Matthew Parker Street, London SW1. (Telephone 01-222 7877, extension 2491.)

The EEC's scheme came into effect on July 1, 1971 and the Japanese scheme on August 1; the Norwegian scheme will come into operation on October 1. Details of these schemes are available for reference in the Statistics & Market Intelligence Library at Export House, 35 Old Bailey, London EC4. Most of the other preference-giving countries are expected to implement their schemes on January 1, 1972.

Schedule B shows the tariff headings of the United Kingdom tariff under which goods on importation from the countries listed in Schedule A will be eligible for GSP (Generalised System of Preferences) treatment and also shows the rate of duty payable if they qualify for such treatment. The rules of origin for determining whether or not products which are included in Schedule B qualify for GSP treatment will be published shortly.

Column 2 of Schedule B describes in general terms the goods covered by the tariff headings in Column 1 but it does not necessarily reproduce the Tariff descriptions in all cases. The Schedule should be read in conjunction with Part 3 of the UK Tariff which gives the precise definitions of goods falling within each tariff heading. For a number of reasons, eg to facilitate the implementation of the GSP, it has been necessary to amend the structure of some existing tariff headings and subject to Parliamentary approval these modifications will come into force on January 1, 1972. Accordingly, discrepancies occur between some of the tariff sub-headings shown in Column 1 of the Schedule and those in the present Customs & Excise Tariff. For the guidance of traders the new tariff headings to be introduced from January 1, 1972 have been indicated by a dagger.

It should be noted that revenue duties, which are charged on wine, spirits, beer, tobacco, hydrocarbon oil, perfumed spirits, matches and mechanical lighters, are not covered by the scheme. In the case of composite goods liable to a revenue duty in respect of a part or ingredient, payment of the revenue duty on the part or ingredient will be charged at the full rate even if the goods as a whole qualify for GSP treatment.

The scheme also does not affect duties and levies (eg anti-dumping duties and levies imposed under the minimum import price schemes for certain agricultural products) imposed under legislation other than the Import Duties Act 1958.

Schedule A

The United Kingdom will regard as eligible developing countries all those of the following countries which undertake to give their full co-operation in establishing the entitlement of their goods to GSP treatment on importation into the United Kingdom.

Independent countries

Afghanistan
Algeria
Argentina
Bahrain
Barbados
Bolivia
Botswana
Brazil
Burma
Burundi
Cameroon
Central African Republic
Ceylon
Chad
Chile
Colombia
Congo, Democratic Republic of the
Congo, Peoples Republic of the
Costa Rica
Cyprus
Dahomey
Dominican Republic
Ecuador
Egypt, Arab Republic of
El Salvador
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Ghana
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Ivory Coast
Jamaica
Jordan
Kenya
Khmer Republic
Korea, Republic of
Kuwait
Laos
Lebanon
Lesotho
Liberia
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Malta
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Pakistan
Panama
Paraguay
Peru
Philippines
Qatar
Rwanda
Saudi Arabia
Senegal
Sierra Leone
Singapore
Somali Democratic Republic
Sudan
Swaziland
Syria
Tanzania
Thailand
Togo
Tonga
Trinidad and Tobago
Trucial states:
  Abu Dhabi
  Dubai
  Ras-al-Kaimah
  Fujairah
  Ajman
  Sharjah
  Umm-al-Qaiwan
Tunisia
Uganda
Upper Volta
Uruguay
Venezuela
Viet-Nam, Republic of
Western Samoa
Yemen Arab Republic
Yemen, Peoples Democratic Republic of
Yugoslavia
Zambia

Dependent territories, associated states and states whose external relations are conducted by third countries

Angola
Antigua
Australian Antarctic Territory
Bahamas
Bermuda
British Antarctic Territory
British Honduras
British Indian Ocean Territory (comprising the Chagos Archipelago, Aldabra, Farquhar and Desroches)
British Solomon Islands Protectorate
Brunei

Cape Verde Islands
Cayman Islands
Christmas Island
Cocos (Keeling) Islands
Corn Islands and Swan Islands
Dominica

Falkland Islands and dependencies
French Antarctic Territories
French Polynesia

Gibraltar
Gilbert and Ellice Islands Colony
Grenada

Heard Island and McDonald Islands
Hong Kong

Macao
Montserrat
Mozambique

Netherlands Antilles
New Caledonia and dependencies
New Hebrides Condominium
Norfolk Island

Overseas Territories of New Zealand:
Niue Island, Tokelau Islands, Ross Dependency and the Cook Islands

Pacific Islands administered by the USA:
Guam, American Samoa (comprising Swain Island), Midway Islands, Johnston Island, Sand Island, Baker, Howland and Jarvis Islands, Wake Island and Johnson Atoll and Kingman Reef. The following mandated islands—the Carolines, the Marianas, and the Marshall Islands
Papua—New Guinea
Pitcairn
Portuguese Guinea
Portuguese Timor
Prince and Sao Tomé Islands

St. Christopher—Nevis—Anguilla
St. Helena (with Ascension and Tristan da Cunha)
St. Lucia
St. Pierre and Miquelon
St. Vincent
Seychelles
Spanish North Africa
Surinam

Territory of New Guinea
Turks and Caicos Islands

Virgin Islands (British)
Virgin Islands (USA)

Wallis and Futuna Islands

Schedule B

UK tariff heading (first four figures correspond to Brussels nomenclature)	Goods covered	GSP rate of duty
02.05	Pig fat free of lean meat and poultry fat (not rendered or solvent-extracted), fresh, chilled, frozen, salted, in brine, dried or smoked	Free
02.06(A)(1) (A)(4)(b) (A)(4)(c)	Meat, salted, in brine, dried or smoked (*except* mutton and lamb, whole hams and pork (including ham and bacon), not being canned or bottled pork)	Free
02.06(B)(1)(b)	Edible offals of beef or veal (*except* sweetbreads and tongues) salted, in brine, dried or smoked	Free
05.08(B)†	Bonemeal	Free
07.03(D)†	Vegetables provisionally preserved in brine, in sulphur water or in other preservative solutions but not specially prepared for immediate consumption *except* cauliflowers, gherkins, olives, capers, sweet peppers and onions	Free
07.04	Dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared	
(A)	Horse-radish	Free
(C)	Tomatoes and leeks	Free
(E)(1)(b)† (E)(2)(b)†	Other vegetables except: (i) herbs not in powder, garlic and sweet peppers; and (ii) asparagus; broad, kidney and runner beans; beetroot; broccoli and cauliflowers; Brussels sprouts; carrots; cucumbers (other than gherkins); herbs in powder; lettuce and endive; mushrooms; dry bulb onions and shallots; peas; potatoes; rhubarb; spinach; turnips; and mixtures containing any of these vegetables	Free
07.05(B) and (C)	Dried leguminous vegetables (*except* peas), shelled whether or not skinned or split	Free
07.06(C)(1)†	Dried arrowroot, salep, Jerusalem artichokes, sweet potatoes and other similar roots and tubers with high starch or inulin content (*except* manioc), whole or sliced	Free
08.01(A)(2)(a)†	Dried Brazil nuts and coconuts, not whole	Free
08.01(B)(2)†	Dried bananas	Free
08.01(C)†	Dried pineapples	Free
08.01(E)(2)†	Dried mangoes, guavas, mangosteens and avocados	Free
08.01(F)†	Dried cashew nuts	Free
08.02(B)	Dried citrus fruit	Free
08.03(B)	Dried figs	Free
08.04(A)	Currants	Free
08.11	Fruit provisionally preserved (for example, by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions), but unsuitable in that state for immediate consumption	
(B)	Bilberries and nuts	Free
(D)(3)(b)	Citrus fruits preserved otherwise than in brine, *except*: (i) grapefruits; (ii) orange, clementine, mandarin or tangerine pulp not containing the peel; and (iii) lemons, oranges, clementines, mandarins and tangerines, comminuted entire	Free
(G)†	Other fruits *except*: (i) cherries; (ii) apples, blackberries, currants, gooseberries, loganberries, pears, plums, damsons, bullace, greengages, mirabelles, raspberries, strawberries, and mixtures containing any of these fruits; and (iii) citrus fruits in brine	Free
08.12(B)	Dried apricots	Free
08.12(C)	Dried fruit of heading No. 08.12 *except* apples, apricots, pears, peaches, nectarines, prunes and bilberries	Free
09.01(A)(1)	Roasted or ground unmixed coffee	Commonwealth preference rate
09.01(C)	Coffee and chicory, roasted and ground, mixed but without other ingredients	Commonwealth preference rate
09.10(C)	Thyme, saffron, bay leaves and other spices, *except* saffron stigmas and styles, dried but not chopped, ground, manufactured or prepared, and thyme and bay leaves, not ground	Free
11.01	Cereal flours	Free
11.02	Cereal groats and cereal meal; other worked cereal grains (for example, rolled, flaked, polished, pearled or kibbled, but not further prepared), except husked, glazed, polished or broken rice; germ of cereals, whole, rolled flaked or ground	Free
11.03	Flours of the leguminous vegetables falling within heading No. 07.05	Free
11.04	Flours of the fruits falling within any heading in Chapter 8	Free
11.06(B)	Flour and meal of arrowroot, salep and other roots and tubers falling within heading No. 07.06 (*except* manioc and sago)	Free
11.07	Malt, roasted or not	Free
11.08(A), (B), (C) and (F)	Starches *except* manioc starch and potato starch (farina); inulin	Free
12.02	Flours or meals of oil seeds or oleaginous fruit, non-defatted (excluding mustard flour)	Free
12.04(A)†	Dried or powdered sugarbeet	Free
12.05(A)†	Dried chicory roots	Commonwealth preference rate
13.03(C) and (D)	Vegetable saps and extracts; pectic substances, pectinates and pectates; agar-agar and other mucilages and thickeners, derived from vegetable products, *except* aloes, cassia pulp, liquorice extract and hop extracts	Free
15.01(B)	Pig fat and poultry fat, rendered or solvent-extracted, *except* lard	Free
15.10	Fatty acids; acid oils from refining; fatty alchols	Free
15.11	Glycerol and glycerol lyes	Free
15.13	Margarine, imitation lard and other prepared edible fats	Free
15.14	Spermaceti, crude, pressed or refined, whether or not coloured	Free
15.16(B)	Vegetable waxes, whether or not coloured, *except* carnauba wax, candelilla wax, esparto wax and ouricury wax	Free
15.17	Residues resulting from the treatment of fatty substances or animal or vegetable waxes	Free
16.02(A)	Pastes of meat or meat offal; poultry liver prepared or preserved	Free
16.02(B)(2)(b)	Other prepared or preserved meat or meat offal not in air tight containers, *except* whole hams	Free
16.03	Meat extracts and meat juices; fish extracts	§See footnote
16.04(A)	Caviar and caviar substitutes	Free
16.04(B)	Prepared or preserved roes *except* caviar and caviar substitutes	Free
16.04(D)	Canned tuna	50 per cent of the full rate

(*continued on page 580*)

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TARIFF PREFERENCES FOR DEVELOPING COUNTRIES

continued

UK tariff heading (first four figures correspond to Brussels nomenclature)	Goods covered	GSP rate of duty
17.02(D)	Glucose, solid or liquid	Free
17.02(E)	Artificial honey (whether or not mixed with natural honey)	Free
17.02(F)	Caramel, solid or liquid	Free
17.02(G)	Other sugars and sugar syrups of heading No. 17.02 *except*: (i) sucrose sugar, solid, which can be complete tested by the polariscope; (ii) invert sugar and syrups containing sucrose; (iii) other sucrose and extracts from sucrose, other than dextrose, which cannot be completely tested by the polariscope	Free
17.04	Sugar confectionery, not containing cocoa	Free
17.05(D)	Flavoured or coloured glucose, solid or liquid	Free
17.05(E)	Other flavoured or coloured sugars and syrups of heading No. 17.05 *except*: (i) sucrose sugar, solid, which can be completely tested by the polariscope; (ii) invert sugar and syrups containing sucrose; (iii) molasses; other sucrose and extracts from sucrose, other than dextrose, which cannot be completely tested by the polariscope	Free
18.06	Chocolate and other food preparations containing cocoa	Free
19.01	Malt extract	Free
19.02	Preparations of flour, meal, starch or malt extract of a kind used as infant food or for dietetic or culinary purposes, containing less than 50 per cent by weight of cocoa	Free
19.03	Macaroni, spaghetti and similar products	Free
19.05	Prepared foods obtained by the swelling or roasting of cereals or cereal products (puffed rice, corn flakes and similar products)	Free
19.06	Communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products	Free
19.07	Bread, ships' biscuits and other ordinary bakers' wares, not containing added sugar, honey, eggs, fats, cheese or fruit	Free
19.08	Pastry, biscuits, cakes and other fine bakers' wares, whether or not containing cocoa in any proportion	Free
20.01(B)†	Vegetables and fruit prepared or preserved by vinegar or acetic acid, with or without sugar, whether or not containing salt, spices or mustard, *except* beetroot, cauliflowers and onions	Free
20.02	Vegetables prepared or preserved otherwise than by vinegar or acetic acid:	
(A)	Olives	Free
(B)	Tomato juice	Free
(C)(1)(a)(i)†	Beans in airtight containers, *except* beans in the pod and broad beans	Free
(C)(1)(b)(ii)	Tomatoes in air tight containers	Free
(C)(1)(e)†	Other vegetables in air tight containers, *except*: (i) asparagus, peas and potato crisps; and (ii) kidney and runner beans; beetroot, broccoli and cauliflowers; Brussels sprouts; carrots; cucumbers (other than gherkins); herbs; lettuce and endive; mushrooms; dry-bulb onions and shallots; potatoes; rhubarb; spinach; turnips; and mixtures containing any of these vegetables	Free
(C)(2)(c)†	Other vegetables not in air tight containers, *except*: (i) potato crisps; and (ii) asparagus; broad, kidney and runner beans; beetroot; broccoli and cauliflowers; Brussels sprouts; carrots; cucumbers (other than gherkins); herbs; lettuce and endive; mushrooms; dry-bulb onions and shallots; peas; potatoes; rhubarb; spinach; turnips; and mixtures containing any of these vegetables	Free
20.04(A)	Apricots, figs and plums (including bullace, damsons, greengages and mirabelles, but not prunes) preserved by sugar (drained, glace or crystallised)	Free
20.04(C)	Other fruit and parts of plants, preserved by sugar (drained, glace or crystallised), *except* cherries and fruit peels	Free
20.06	Fruit otherwise prepared or preserved, whether or not containing added sugar or spirit:	
(H)	Nuts	Free
(IJ)(3)	Oranges, clementines, mandarins and tangerines, *except* fruit comminuted entire, and pulp not containing the peel	Free
(O)(2)†	Other fruit, *except* apples, apricots, blackberries, cherries, currants, ginger, gooseberries, grapefruit, lemons, loganberries, peaches, pears, pineapples, plums (including bullace, damsons, greengages and mirabelles), raspberries, strawberries, and, certain mixtures of fruit (for details see UK Customs and Excise Tariff)	Free
20.07(A)(1)(b) (A)(2)(b)	Citrus fruit juices, containing more than 20 per cent. by weight of added sweetening matter but unfermented and not containing spirit	Free
20.07(B)	Pineapple juice and tomato juice, whether or not containing added sugar, but unfermented and not containing spirit	Free
20.07(D)†	Other fruit juices and vegetable juices, whether or not containing added sugar, but unfermented and not containing spirit, *except* apple juice, blackcurrant juice and pear juice	Free
21.01	Roasted chicory and other roasted coffee substitutes: extracts, essences and concentrates thereof	Commonwealth preference rate
21.02(A)† (B)†	Extracts, essences or concentrates of coffee; preparations with a basis of extracts, essences or concentrates of coffee	Commonwealth preference rate
21.02(C)†	Extracts, essences or concentrates, of tea or mate; preparations with a basis of those extracts, essences or concentrates	Free
21.03	Mustard flour and prepared mustard	Free
21.04	Sauces; mixed condiments and mixed seasonings	Free
21.05(A)†	Soups and broths, in liquids, solid or powder form	Free
21.05(B)(2)(b)†	Homogenised composite food preparations *except* those containing meat or meat offal or fish	Free
21.06	Natural yeasts (active or inactive); prepared baking powders	Free
21.07	Food preparations not elsewhere specified or included	Free
22.01(A)	Waters, including spa waters and aerated waters	Free
22.02	Lemonade, flavoured spa waters and flavoured aerated waters, and other non-alcoholic beverages, not including fruit and vegetable juices falling within heading No. 20.07	Free
22.04	Grape must, in fermentation or with fermentation arrested otherwise than by the addition of alcohol	Free
22.10	Vinegar and substitutes for vinegar	Free
23.01(B)†	Flours and meals of meat and offal, unfit for human consumption	Free
23.02	Bran, sharps and other residues derived from the sifting, milling or working of cereals or of leguminous vegetables	Free
23.03(B)	Beet-pulp and other waste of sugar manufacture (*except* bagasse); brewing and distilling dregs and waste; residues of starch manufacture and similar residues	Free
23.06(C)	Products of vegetable origin of a kind used for animal food, not elsewhere specified or included, *except* dried apple pomace, unground, and dried citrus fruit waste	Free
23.07(A)	Vitamin supplements of a kind used in animal feeding	Free
23.07(C)	Sweetened forage and other preparations of a kind used in animal feeding *except* liquefied herring	Free
All Chapter 25	Salt, sulphur, earths and stone; plastering materials, lime and cement	Free
27.03	Peat (including peat litter), whether or not agglomerated	Free
27.05	Retort carbon	Free
27.05(bis)	Coal gas, water gas, producer gas and similar gases	Free
27.06(B)	The following, not being hydrocarbon oil¶: Tar distilled from coal, from lignite or from peat, and other mineral tars, including partially distilled tars and blends of pitch with creosote oils or with other coal tar distillation products	Free
27.07(B)	The following, not being hydrocarbon oil¶: Oils and other products of the distillation of high temperature coal tars and similar oils and products obtained by other processes (for example, benzole, creosote, cresylic acid and solvent naphtha)	Free
27.08	Pitch and pitch coke, obtained from coal tar or from other mineral tars	Free

UK tariff heading (first four figures correspond to Brussels nomenclature)	Goods covered	GSP rate of duty
27.10(B)	The following, not being hydrocarbon oil¶: Petroleum oils and oils obtained from bituminous minerals, other than crude; preparations not elsewhere specified or included, containing not less than 70 per cent by weight of petroleum oils or of oils obtained from bituminous minerals, these oils being the basic constituents of the preparations:	
(1)	containing light oil‖	8 per cent hydrocarbon oil duty
(2)	not containing light oil‖	Free
27.11	Petroleum gases and other gaseous hydrocarbons	Free
27.12(B)	Petroleum jelly not being hydrocarbon oil¶	Free
27.13	Paraffin wax, micro-crystalline wax, slack wax, ozokerite, lignite wax, peat wax and other mineral waxes, whether or not coloured	Free
27.14(A) and (C)	The following, not being hydrocarbon oil¶: Petroleum bitumen, petroleum coke and other residues of petroleum oils or of oils obtained from bituminous minerals	Free
27.15	Bitumen and asphalt, natural; bituminous shale, asphaltic rock and tar sands	Free
27.16(B)	The following, not being hydrocarbon oil¶: Bituminous mixtures based on natural asphalt, on natural bitumen, on petroleum bitumen, on mineral tar or on mineral tar pitch (for example, bituminous mastics, cut-backs)	Free
All Chapter 28	Inorganic chemicals; organic and inorganic compounds of precious metals, of rare earth metals, of radio-active elements and of isotopes	Free
29.01(A)(2)	Styrene monomer	£0.2250 per gallon hydrocarbon oil duty
29.01(A)(3)	Hydrocarbon oil¶ *except* the oils specified in heading Nos. 29.01(A)(1) and (2)	£0.2250 per gallon hydrocarbon oil duty
All Chapter 29 (except 29.01(A))	Organic chemicals (*except* hydrocarbon oil¶)	Free
All Chapter 30	Pharmaceutical products	Free
All Chapter 31	Fertilisers	Free
All Chapter 32 (except 32.09(A))	The following, not being hydrocarbon oil¶: Tanning and dyeing extracts; tannins and their derivatives; dyes, colours, paints and varnishes; putty, fillers and stopings; inks	Free
All Chapter 33 (except 33.06(A))	Essential oils and resinoids; perfumery, cosmetics and toilet preparations (*except* perfumed spirits)	Free
34.03(B)(1)	Lubricating preparations, and preparations of a kind used for oil or grease treatment of textiles, leather or other materials, but not including preparations containing 70 per cent or more by weight of petroleum oils or of oils obtained from bituminous minerals (*except* those containing 50 per cent or more by weight of siloxanes), containing light oil‖	8 per cent hydrocarbon oil duty
All Chapter 34 (except 34.03(B)(1))	Soap, organic surface-active agents, washing preparations, lubricating preparations, artificial waxes, prepared waxes polishing and scouring preparations, candles and similar articles, modelling pastes and 'dental waxes' (*except* products of heading No. 34.03(B)(1) described above)	Free
All Chapter 35 (except 35.01(B))	Albuminoidal substances; glues (*except* casein, caseinates and other casein derivatives)	Free
36.01	Propellent powders	Free
36.02	Prepared explosives, other than propellent powders	Free
36.03	Mining, blasting and safety fuses	Free
36.04	Percussion and detonating caps; igniters; detonators	Free
36.05(B)	Pyrotechnic articles (for example, fireworks, railway fog signals, amorces, rain rockets), *except* Bengal matches	Free
36.07	Ferro-cerium and other pyrophoric alloys in all forms	Free
36.08(B)	Metaldehyde and hexamine	Free
36.08(C)	Firelighters containing heavy oils	4.5 per cent hydrocarbon oil duty
36.08(D)	Other combustible preparations and products (*except* hydrocarbon oil¶)	Free
All Chapter 37	Photographic and cinematographic goods	Free
38.01	Artificial graphite; colloidal graphite, other than suspensions in oil	Free
38.02	Animal black (for example bone black and ivory black), including spent animal black	Free
38.03	Activated carbon (decolourising, depolarising or adsorbent); activated diatomite, activated clay, activated bauxite and other activated natural mineral products	Free
38.04	Ammoniacal gas liquors and spent oxide produced in coal gas purification	Free
38.05	Tall oil	Free
38.06	Concentrated sulphite lye	Free
38.07(B)	The following not being hydrocarbon oil¶: Spirits of turpentine (gum, wood and sulphate) and other terpenic solvents produced by the distillation or other treatment of coniferous woods; crude dipentene; sulphite turpentine; pine oil (excluding 'pine oils' not rich in terpineol)	Free
38.08(B)	The following not being hydrocarbon oil¶: Rosin and resin acids, and derivatives thereof other than ester gums included in heading No, 39.05; rosin spirit and rosin oils	Free
38.09	Wood tar; wood tar oils (other than the composite solvents and thinners falling within heading No. 38.18); wood creosote; wood naphtha; acetone oil	Free
38.10	Vegetable pitch of all kinds; brewers' pitch and similar compounds based on rosin or on vegetable pitch; foundry core binders based on natural resinous products	Free
38.11	Disinfectants, insecticides, fungicides, weed-killers, anti-sprouting products, rat poisons and similar products, put up in forms or packings for sale by retail or as preparations or as articles (for example, sulphur-treated bands, wicks and candles, fly-papers)	Free
38.12	Prepared glazings, prepared dressings and prepared mordants, of a kind used in the textile, paper, leather or like industries	Free
38.13	Pickling preparations for metal surfaces; fluxes and other auxiliary preparations for soldering, brazing or welding; soldering, brazing or welding powders and pastes consisting of metal and other materials; preparations of a kind used as cores or coatings for welding rods and electrodes	Free
38.14(B) and (C)	The following not being hydrocarbon oil¶: Anti-knock preparations, oxidation inhibitors, gum inhibitors, viscosity improvers, anti-corrosive preparations and similar prepared additives for mineral oils	Free
38.15	Prepared rubber accelerators	Free
38.16	Prepared culture media for development of micro-organisms	Free
38.17	Preparations and charges for fire-extinguishers; charged fire-extinguishing grenades	Free
38.18(B)	The following not being hydrocarbon oil¶: Composite solvents and thinners for varnishes and similar products:	8 per cent hydrocarbon oil duty
1(a) and 2(a)	Containing light oil‖	
1(b) and 2(b)	Not containing light oil‖	Free
38.19 (except 38.19(A))	The following not being hydrocarbon oil¶: Chemical products and preparations of the chemical or allied industries (including those consisting of mixtures of natural products), not elsewhere specified or included; residual products of the chemical or allied industries not elsewhere specified or included	Free
All Chapter 39 (except 39.02(A))	The following not being hydrocarbon oil¶: Artificial resins and plastic materials, cellulose esters and ethers; articles thereof	Free
All Chapter 40	Rubber, synthetic rubber, factice, and articles thereof	Free
41.02(A)	Box and willow calf, box and willow sides and other chrome tanned leather, imported in skins or pieces weighing less than 4 lb. each, but not including wet blue chrome tanned leather	Free
41.03	Sheep and lamb skin leather, except leather falling within heading No. 41.06, 41.07 or 41.08	Free
41.04	Goat and kid skin leather, except leather falling within heading No. 41.06, 41.07 or 41.08	Free
41.05	Other kinds of leather, except leather falling within heading No. 41.02(B), 41.06, 41.07 or 41.08	Free
41.06	Chamois-dressed leather	Free
41.07	Parchment-dressed leather	Free
41.10	Composition leather with a basis of leather or leather fibre, in slabs, in sheets or in rolls	Free
All Chapter 42	Articles of leather; saddlery and harness; travel goods, handbags and similar containers; articles of animal gut (other than silk-worm gut)	Free
All Chapter 43	Furskins and artificial fur; manufactures thereof	Free
All Chapter 44	Wood and articles of wood; wood charcoal	Free
All Chapter 45	Cork and articles of cork	Free
All Chapter 46	Manufactures of straw, of esparto and of other plaiting materials; basketware and wickerwork	Free
All Chapter 47	Paper-making material	Free
All Chapter 48	Paper and paperboard; articles of paper pulp, of paper or of paperboard	Free

(*continued on page 582*)

TARIFF PREFERENCES FOR DEVELOPING COUNTRIES
continued

UK tariff heading (first four figures correspond to Brussels nomenclature)	Goods covered	GSP rate of duty
All Chapter 49	Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans	Free
50.03(B)(1)(a)	Silk waste (including cocoons unsuitable for reeling, silk noils and pulled or garnetted rags), other than wholly of silk, not carded or combed in which the textile material which predominates in weight is man-made fibre	Free
50.03(B)(2)	Silk waste, (including cocoons unsuitable for reeling, silk noils and pulled or garnetted rags), other than wholly of silk, carded or combed	Free
50.04	Silk yarn, other than yarn of noil or other waste silk, not put up for retail sale	Free
50.05	Yarn spun from silk waste other than noil, not put up for retail sale	Free
50.06	Yarn spun from noil silk, not put up for retail sale	Free
50.07	Silk yarn and yarn spun from noil or other waste silk, put up for retail sale	Free
50.08(B)	Imitation catgut of silk	Free
55.01(B)	Cotton, bleached or dyed, not carded or combed	Free
55.02(B)	Cotton linters, bleached	Free
55.04	Cotton, carded or combed	Free
57.02(B)	Manila hemp (abaca) (*Musa textilis*), raw or processed but not spun; tow and waste of manila hemp (including pulled or garnetted rags or ropes), other than manila hemp, tow and waste of manila hemp, not carded or combed	Free
57.03(B)	Jute and other textile bast fibres of this Chapter (*except* true hemp), raw or processed but not spun; tow and waste thereof (including pulled or garnetted rags or ropes): carded or combed	Free
57.04	Other vegetable textile fibres of this Chapter (*except* true hemp), raw or processed but not spun; waste of such fibres (including pulled or garnetted rags or ropes):	
(A)	Coir fibre	Free
(B)(2)	Other, carded or combed	Free
57.06	Yarn of jute or of other textile bast fibres of heading No. 57.03	Free
57.07	Yarn of other vegetable textile fibres of this Chapter, *except* true hemp	Free
57.08	Paper yarn	Free
57.10	Woven fabrics of jute or of other textiles bast fibres of heading No. 57.03	Free
57.11	Woven fabrics of other vegetable textile fibres of this Chapter, *except* true hemp	Free
57.12	Woven fabrics of paper yarn	Free
58.01	Carpets, carpeting and rugs, knotted (made up or not)	Free
58.02	Other carpets, carpeting, rugs, mats and matting, and 'Kelem', 'Schumacks' and 'Karamanie' rugs and the like (made up or not)	Free
58.05(B)(1)†	Narrow woven fabrics, and narrow fabrics (bolduc) consisting of warp without weft assembled by means of an adhesive, other than goods falling within heading No. 58.06, containing more than 50 per cent by weight of fibres falling within heading Nos. 57.03 or 57.04 but not containing silk or man-made fibres	Free
58.08(A)	Tulle and other net fabrics (but not including woven, knitted or crocheted fabrics), plain, knotted	Free
59.01(A)(1) and (B)	Wadding and articles of wadding; textile flock and dust containing man-made fibres; mill neps	Free
59.02	Felt and articles of felt, whether or not impregnated or coated	Free
59.03	Bonded fibre fabrics, similar bonded yarn fabrics, and articles of such fabrics, whether or not impregnated or coated	Free
59.04	Twine, cordage, ropes and cables, plaited or not	Free
59.05	Nets and netting made of twine, cordage or rope, and made up fishing nets of yarn, twine, cordage or rope	Free
59.06	Other articles made from yarn, twine, cordage, rope or cables, other than textile fabrics and articles made from such fabrics	Free
59.07	Textile fabrics coated with gum or amylaceous substances, of a kind used for the outer covers of books and the like; tracing cloth; prepared painting canvas; buckram and similar fabrics for hat foundations and similar uses:	
(A)	Containing silk or man-made fibres	Free
(B)(2)†	Not containing silk or man-made fibres and not containing woven fabrics of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
59.08	Textile fabrics impregnated, coated, covered or laminated with preparations of cellulose derivatives or of other artificial plastic materials:	
(A)	Containing silk or man-made fibres	Free
(B)(2)†	Not containing silk or man-made fibres and not containing woven fabric of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
59.09	Textile fabrics coated or impregnated with oil or preparations with a basis of drying oil:	
(A)	Containing silk or man-made fibres	Free
(B)(2)†	Not containing silk or man-made fibres and not containing woven fabric of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
59.10	Linoleum and materials prepared on a textile base in a similar manner to linoleum, whether or not cut to shape or of a kind used as floor coverings; floor coverings consisting of a coating applied on a textile base, cut to shape or not	Free
59.11	Rubberised textile fabrics, other than rubberised knitted or crocheted goods:	
(A)	Containing silk or man-made fibres	Free
(B)(2)†	Not containing silk or man-made fibres and not containing woven fabric of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
59.12(A)	Textile fabrics otherwise impregnated or coated:	
(1)	Containing silk or man-made fibres	Free
(2)(b)†	Not containing silk or man-made fibres and not containing woven fabric of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
59.12(B)	Painted textile fabrics being theatrical scenery, studio back-cloths or the like	Free
59.13	Elastic fabrics and trimmings (other than knitted or crocheted goods) consisting of textile materials combined with rubber threads:	
(A)	Containing silk or man-made fibres	Free
(B)(2)†	Not containing silk or man-made fibres, other than woven fabric containing more than 50 per cent by weight of cotton	Free
59.14	Wicks, of woven, plaited or knitted textile materials, for lamps, stoves, lighters, candles and the like; tubular knitted gas-mantle fabric and incandescent gas mantles:	
(A)	Containing man-made fibres	Free
(B)(2)†	Not containing man-made fibres and not of woven fabric containing more than 50 per cent by weight of cotton	Free
59.15	Textile hosepiping and similar tubing, with or without lining, armour or accessories of other materials:	
(A)†	Containing more than 5 per cent by weight of silk, of man-made fibres, or of both together	Free
(B)(2)†	Not containing more than 5 per cent by weight of silk, of man-made fibres, or of both together, and not containing woven fabric of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
59.16	Transmission, conveyor or elevator belts or belting, of textile material, whether or not strengthened with metal or other material:	
(A)†	Containing more than 5 per cent by weight of silk, of man-made fibres, or of both together	Free
(B)(2)†	Not containing more than 5 per cent by weight of silk, of man-made fibres, or of both together, and not containing woven fabric of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
59.17	Textile products and textile articles, of a kind commonly used in machinery or plant:	
(B)	Woven textile felts of a kind used in paper-making machinery, in the form of tubes or endless bands, whether woven as such or assembled by splicing, sewing or otherwise, or in the form of flat fabrics fitted with eyelets or other means of fastening, ready for assembly into tubes or endless bands by such fastening	Free
(C)	Other textile fabrics (*except* bolting cloth, not treated or operated upon, containing no other fibre than silk); cords, braids and the like of a kind used as packing or lubricating materials	Free
(D)	Other (*except* bolting cloth, not treated or operated upon, containing no other fibre than silk):	
(1)†	Containing more than 5 per cent by weight of silk, of man-made fibres, or of both together	Free

UK tariff heading (first four figures correspond to Brussels nomenclature)	Goods covered	GSP rate of duty
(2)(b)†	Not containing more than 5 per cent by weight of silk, of man-made fibres, or of both together, and not containing woven fabric of which the cotton content exceeds 50 per cent by weight of the total textile fabric content	Free
62.03(B)	Sacks and bags, of a kind used for the packing of goods, *except* used sacks and bags containing 85 per cent or more by weight of jute	Free
63.02(A)	Used or new rags, scrap twine, cordage, rope and cables and worn out articles of twine, cordage, rope or cables, containing more than 55 per cent by weight of man-made fibres	Free
All Chapter 64	Footwear, gaiters and the like; parts of such articles	Free
All Chapter 66	Umbrellas, sunshades, walking-sticks, whips, riding-crops and parts thereof	Free
All Chapter 67	Prepared feathers and down and articles made of feathers or of down; artificial flowers; articles of human hair; fans	Free
All Chapter 68	Articles of stone, of plaster, of cement, of asbestos, of mica, and of similar materials	Free
All Chapter 69	Ceramic products	Free
All Chapter 70	Glass and glassware	Free
All Chapter 71	Pearls, precious and semi-precious stones, precious metals, rolled precious metals, and articles thereof; imitation jewellery	Free
All Chapter 73 (except 73.01(E)(1)†)	Iron and steel (*except* haematite, forge and foundry pig iron and forge and foundry cast iron), and articles thereof	Free
All Chapter 74	Copper and articles thereof	Free
All Chapter 75	Nickel and articles thereof	Free
All Chapter 76	Aluminium and articles thereof	Free
All Chapter 77	Magnesium and beryllium and articles thereof	Free
All Chapter 78	Lead and articles thereof	Free
All Chapter 79 (except 79.01(A))	Zinc (*except* unwrought zinc, other than alloys of zinc) and articles thereof	Free
All Chapter 80	Tin and articles thereof	Free
All Chapter 81	Other base metals employed in metallurgy and articles thereof	Free
All Chapter 82	Tools, implements, cutlery, spoons and forks, of base metal; parts thereof	Free
All Chapter 83	Miscellaneous articles of base metals	Free
All Chapter 84	Boilers, machinery and mechanical appliances; parts thereof	Free
All Chapter 85	Electrical machinery and equipment; parts thereof	Free
All Chapter 86	Railway and tramway locomotives, rolling-stock and parts thereof; railway and tramway track fixtures and fittings; traffic signalling equipment of all kinds (not electrically powered)	Free
All Chapter 87	Vehicles, other than railway or tramway rolling-stock, and parts thereof	Free
All Chapter 88	Aircraft and parts thereof; parachutes; catapults and similar aircraft launching gear; ground flying trainers	Free
All Chapter 89	Ships, boats and floating structures	Free
All Chapter 90	Optical, photographic, cinematographic, measuring, checking, precision, medical and surgical instruments and apparatus; parts thereof	Free
All Chapter 91	Clocks and watches and parts thereof	Free
All Chapter 92	Musical instruments; sound recorders and reproducers; television image and sound recorders and reproducers, magnetic; parts and accessories of such articles	Free
All Chapter 93	Arms and ammunition; parts thereof	Free
All Chapter 94	Furniture and parts thereof; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings	Free
All Chapter 95	Articles and manufactures of carving or moulding material	Free
All Chapter 96	Brooms, brushes, feather dusters, powder-puffs and sieves	Free
All Chapter 97	Toys, games and sports requisites; parts thereof	Free
All Chapter 98 (except 98.10(A)(1) and (2))	Miscellaneous manufactured articles (*except* portable lighters, whether complete or incomplete)	Free
All Chapter 99	Works of art, collectors' pieces, and antiques	Free

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§ Rate of duty for meat extracts and meat juices derived wholly or in part from beef or veal is 50 per cent of the full rate. Other goods within this heading are free of duty.

¶ Hydrocarbon oil as defined in (*a*) of the Special Note to Chapter 27 of the United Kingdom Tariff.

|| Light oil as defined in (*b*) of the Special Note to Chapter 27 of the United Kingdom Tariff.

EEC/EFTA Information Unit at DTI

THE EFTA Information Centre at the Department of Trade and Industry has now been expanded into the EEC/EFTA Information Unit.

EEC Information: The Unit is the Department's central inquiry point for general questions and, where necessary, will put inquirers in touch with appropriate specialists in the Department. Inquiries on specific matters, however, should continue to be addressed to the appropriate part of the Department dealing with the particular matter where this is known.

EFTA Information: The Unit will continue to disseminate information about the European Free Trade Association and to deal with general inquiries and advise on sources of more detailed information on EFTA. Copies of EFTA publications (including the Secretariat's regular EFTA Bulletin) can be obtained free of charge from the Unit.

The EEC/EFTA Information Unit is at DTI, 1 Victoria Street, London SW1H 0ET. Telephone: 01-222 7877. EEC Inquiries Ext. 3579 or 2479, EFTA Inquiries Ext. 2480 or 2479.

Licensing and selling know-how

LICENSING and the sale of know-how will be discussed at a London Chamber of Commerce and Industry Forum to be held on Wednesday, October 20, at the Elizabeth Suite, Wood Street, London EC2. The team of experts speaking at this one-day conference will include Mr. A. H. K. Slater, Head of International Technology Branch, Department of Trade and Industry. Other speakers will be Mr. J. M. Aubrey—General Manager, Legal Patent and Trademark Services, Courtaulds Ltd.—who will discuss aspects of sharing innovation across national frontiers; Mr. D. Acheson—Managing Director, Wimpey International Ltd.—who will outline some of the problems and opportunities of international franchising; Mr. A. McClennan—Group Legal Adviser, Chloride Electrical Storage Co. Ltd.—who will describe how international technical assistance agreements operate; and Mr. E. J. W. Bridges—a partner in a City firm of Chartered Accountants—who will explain about taxation problems in international royalty agreements. Further details from LCC Forum, London Chamber of Commerce, 69 Cannon Street, London EC4N 5AB (Tel. 01-248 4444, ext. 10).

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AVIATION and SHIPPING

Air traffic routeing policy endorsed

CURRENT policy of concentrating aircraft along narrowly-defined minimum noise routes is endorsed by a Working Group of the Noise Advisory Council in a report now published. (*The Noise Advisory Council. Aircraft Noise: Flight Routeing Near Airports.* HMSO 30p.)

The Working Group—led by Mr Eric Epson, a former Chairman of the British Association for the Control of Aircraft Noise—analyses in detail the problems of aircraft noise around airports and the measures currently being taken to control it. The report follows a request made in November last year by Mr Michael Noble, Minister of Trade, for advice on the balance of social advantage in terms of noise disturbance between spreading aircraft routes as widely—or concentrating them as narrowly—as possible.

Looking ahead over the next 20 years or so the Group concludes that the balance of social advantage must lie with a policy of the maximum practicable concentration of aircraft along narrowly-defined minimum noise routes—which is broadly the current policy. They see no real scope at present for taking account of noise in the routeing of aircraft coming in to land; though they support the research being undertaken into longer-term possibilities of approach techniques which might alleviate disturbance.

The Group also suggest that further work should be carried out on people's reactions to high levels of aircraft noise exposure and on the possibility of alternating the use of minimum noise routes.

Once a desirable pattern of departure routes has been established the Group consider that it should be regarded as permanent: and that if subsequent changes are unavoidable, those people adversely affected should be compensated. In order to help pilots to keep closely to the set routes, they recommend the generous provision of navigational aids.

While the Noise and Number Index scale—devised by Sir Alan Wilson's Committee on the Problem of Noise to quantify disturbance from aircraft noise—has been criticised and while they recognise its limitations, the Group accept that, for the purposes of comparison, it is at least as reliable an indicator of this kind of disturbance as any system in use.

Finally they regard it as essential that planning for airport operation and expansion and for future land-use development should proceed hand-in-hand. To this end they advocate the use of predicted noise contour maps in development control.

Minister's welcome

'It is certainly gratifying that an independent group should not only acknowledge so handsomely our constant effort to reduce disturbance, but should also endorse our policy of concentrating air traffic over as few people as possible', said Mr. Michael Noble, Minister for Trade, on September 19, welcoming the publication of the report.

'Until Foulness and new types of quieter aircraft are available, my dilemma is that our noise abatement procedures are often only capable of reducing one community's exposure to noise at the cost of spreading the nuisance to another or perhaps alternating between two or three such communities. This is why I sought the Council's guidance on the balance of social advantage,' he said.

'The Report's main value and indeed the unique achievement of Mr. Eric Epson and his colleagues on the working group, is to show how the system works and what possibilities and constraints exist for purposes of routeing air traffic in a practical and socially responsible manner.

'The report offers a number of thoughtful and constructive recommendations. Some of these are within the competence of my Department and well in line with our general noise abatement policy. Others, like compensation for those affected by new or altered routeings, and arrangements for planning airport and local land use developments hand-in-hand, will have to be examined by the Government in a wider context.

Mr. K. Niwa, Japanese Minister of Transport, now visiting Britain, is seen here studying an air traffic control suite in the operations room of Mediator, the new air traffic control system at West Drayton, Middlesex. Explaining details is Mr. John Page (right), a senior air traffic controller. During its first seven months of operation, Mediator has successfully handled about 10 per cent more air traffic movements over Southern England than took place under the previous systems last year, and further developments toMediator are planned in order to handle the traffic growth of the future.

'Meanwhile I welcome the report as a constructive contribution towards my difficult task of balancing conflicting considerations and towards a better public understanding of the problems involved in air traffic routeing.'

Loan guarantee for RB 211

MR. David Price, Parliamentary Under-Secretary of State for Aerospace, announced on September 14: "The United States Government have informed the British Government that their Loan Guarantee Board has approved the giving of US Government guarantees for further loans to Lockheed of up to $250 million—which amount the US Government consider to be sufficient for Lockheed to carry out the TriStar project.

'Rolls-Royce (1971) Ltd and Lockheed have informed the Department of Trade and Industry that the remaining pre-conditions for bringing into effect their RB 211 contract have been met, including the confirmation of existing airline orders for TriStar.

'The confirmation of this contract will make the conclusion of a long period of uncertainty, and will allow the RB 211 programme to proceed as planned. I wish the RB 211/TriStar project every success.'

Tonnage measurement of ships: instructions for surveyors

THE Department of Trade and Industry has published the first of three volumes of Instructions to Surveyors on Tonnage Measurement of Ships. The first volume, *Measurement of British Tonnage* is now available from Her Majesty's Stationery Office, price £2.25 or through any bookseller. Details of publication of the other two volumes, *Measurement of Suez Canal Tonnage* and *Measurement of Panama Canal Tonnage* will be announced in due course. Together, these three volumes supersede the 1956 publication *Tonnage Measurement of Ships* (reprinted 1962) and the 1955 publication *Measurement of Vessels for the Panama Canal* (reprinted 1962). the new volumes will be published in loose leaf form to facilitiate later amendment. Arrangements may be made at the time of purchase to obtain amendment sheets as they are issued.

Government surplus sales

MINISTRY OF DEFENCE

September 29-30 Commercial, Heavy Duty and Other Vehicles

Location: Ordnance Storage and Disposal Depot, Ruddington, Notts.

Auctioneers: Walker, Walton & Hanson (Dept. L), Byard Lane, Bridlesmith Gate, Nottingham (Tel. 0602 54272)

Commercial vehicles including, heavy duty trucks and tractors by Leyland and Scammell; Thorneycroft 'Antar' heavy duty tractors; excavators by Blaw Knox, Coles, Jones, Neals and Taylor; loading shovels and dozers by Bray, Fowler, Gainsborough, Muir Hill and Michigan; graders; dumpers; International half tracks; fork lift trucks; agricultural tractors; factory trucks; Bedford fire tenders with Sigmund pumps 4 × 4 drive; Coventry Climax Featherweight Pumps with axles and wheels; trailers; Diamond 'T' 20-ton tractors; Scammell breakdown trucks; coaches; hydraulic tippers; refuellers; saloons, limousines, estate cars by Austin, Morris, Vauxhall, Hillman; Minibuses; light vans; motor cycles, etc.

October 7, 1971 Miscellaneous Stores

Location: Memorial Hall (Entrance through Central Hall), High Street, Chatham

Auctioneers: Fuller Horsey Sons & Cassell (Dept. L), 10 Lloyds Avenue, London EC3 3BJ (Tel. 01-709 0101)

Machine tools; rubber mixing and sheeting mill; transformers; air compressors; fork lift trucks; Fordson Super Major Tractor with Morewear Dumper Trailer; diesel driven paving machines; Mastic asphalt mixer; weigh batching machine; ball and roller bearings; copper, brass, cupro, steel and galvanised iron tubing; aluminium ingots; 5,000 Lok-Padlocks; analytical, aperiodic and other balances; laboratory equipment; Vickers electron microscope; electrical optical particle counter; wireless, telephone and electrical equipment; test sets; service clothing; curtain material; boots and shoes; carpets; rugs; large quantity of furniture; kitchen utensils; crockery and glassware; numerous other effects.

October 14, 1971 Miscellaneous Stores

Location: Cavalry Barracks, Butt Road, Colchester, Essex

Auctioneers: Fenn Wright & Co. (Dept. L), 146 High Street, Colchester (Tel. 0206 46161)

Compressor 100 psi, 375 cfm; 27½ kVA generator; fork lift trucks; 2½ ton and 10 ton road rollers; portable chargers and generating sets; Petbow electric welding plant; Benford 10/7 concrete mixer; scientific, electronic and engineering equipment; non-ferrous metals; textiles and rags; GS MkII tent inners; large quantities of furniture, clothing and other miscellaneous stores.

October 20-21, 1971 Miscellaneous Stores

Location: Regional Depot, RAOC, Hereford

Auctioneers: Russell Baldwin & Bright (Dept. L), 20 King Street, Hereford (Tel. 0432 4366)

Aircraft and electrical spares; bearings: 6 kW. generating sets; crawler coal grabs (12 and 20 tons); fork lift trucks; mobile laundry; vehicle spares; banding machines; fire extinguishers; fire buckets; stirrup pumps; steel boxes; plant spares; portable electric drills and electric saws; engine lathe; clothing and textiles; furniture; kitchen ware, etc.

Catalogues of the above sales obtainable from relevant auctioneers about two weeks prior to and up to date of sale, price 5p (postal order only).

DEPARTMENT OF TRADE AND INDUSTRY

Ship for Sale

Offers are invited for the purchase of the undermentioned Royal Fleet Auxiliary vessel 'as lying' at HM Dockyard, Devonport.

'Rowanol' (ex 'Cedarol'). Steel, built 1956. G.T.1, 440. N.T. 482. Length (B.P.) 218 ft. Breadth (mld) 38 ft. Depth (mld) 17 ft. Light displacement 1,032 tons. Engine: Single screw, steam reciprocating, triple expansion, by Lobnitz & Co. Ltd., Renfew. IHP 1140.

T & I SUBSCRIPTIONS AND SALES

Subscription and sales inquiries about *Trade and Industry* should be directed to HMSO at any of the following addresses, 49 High Holborn, London, W.C.1: 13a Castle Street, Edinburgh 2: Brazennose St., Manchester 2; 258 Broad Street, Birmingham 1; 109 St. Mary Street, Cardiff; 50 Fairfax St., Bristol 1; 7-11 Linenhall St., Belfast 1: or through any bookseller.

Copies of form of purchase agreement, further particulars, plan and authority to inspect can be obtained from the Department of Trade and Industry, Room 42, Parliament Square House 34/36 Parliament Street, London SW1. Tel: 01-222 7060, ext. 26.

Offers should be addressed to the Department of Trade and Industry, Room 43, at the above address, in envelopes clearly marked 'Offer to purchase "ROWANOL"' and must be received not later than *noon* on October 21, 1971.

The above information is given for guidance only and any prospective purchaser must satisfy himself regarding actual details of the vessel and her present condition.

DEPARTMENT OF THE ENVIRONMENT

October 5, 1971

Location: Department of the Environment Supplies Division Stores, India Pavilion, Exhibition Grounds, Wembley, Middlesex. (Tel. 01-902 4482)

Auctioneers: Messrs. Fuller Horsey, Sons and Cassell, 10 Lloyds Avenue, Fenchurch Street, London EC3N 3BJ. (Tel. 01-709 1001)

Office and miscellaneous furniture, engineering, electrical, canteen, domestic and other equipment, etc.

Catalogues: price 5p direct from auctioneer.

View days: day preceding and morning of sale.

GOVERNMENT AND BUSINESS

The quarterly journal of the Economists Advisory Group which summarises, analyses and forecasts Government policy and what it means for business.

Contents of the September issue, just out:

X-Inefficiency and Public Policy—Charles K. Rowley

Restricting the Public Sector—Graham Bannock (with a table listing candidates for 'hiving-off' from the nationalised industries)

Annual Survey of Prices and Incomes Policy—P. J. Sloane

Diary of economic events, administrative action and policy statements. 24.5.71—22.8.71.

At £15.75 p.a., special rates for educational libraries, single issues and back numbers. Further details from:

EAG, 33 Southampton Street, London, WC2E 7HE
01-240 1921/2

The Economists Advisory Group is an independent economic and research consultancy directed by five professors of economics and managed by a business economist.

STATISTICS

Index to statistics and organisational information published regularly in TRADE and INDUSTRY

A = annually; M = monthly; Q = quarterly; 6M = every six months.

All dates before October 21, 1970, refer to articles in the *Board of Trade Journal*

Title	Last published
Air transport:	
Aircraft noise at Heathrow and Gatwick airports (Q)	July 22, 1971
Air miss reports (A)	April 1, 1970
Mileage and traffic (A)	April 29, 1970
Trade by air (6-M)	Mar. 24, 1971
Balance of payments:	
Civil aviation (Q)	Oct. 28, 1970
Trends in invisible transactions (Q)	Sept. 16, 1971
UK balance of payments (Q)	Sept. 16, 1971
Bankruptcy orders (Q)	May 5, 1971
Business names registered (A)	Jan. 27, 1971
Capital expenditure:	
Distributive and service trades (A)	April 28, 1971
Industry's capital expenditure (Q)	Sept. 16, 1971
Catering trades turnover (M)	Sept. 16, 1971
Chemicals industry (Q)	Aug. 26, 1971
Companies:	
Acquisitions and mergers (Q)	Aug. 26, 1971
New companies registered:	
Gt. Britain (M)	This week
N. Ireland (M)	Sept. 2, 1971
Computers:	
UK computer market (Q)	Aug. 19, 1971
Construction work overseas (A)	Aug. 26, 1971
Credit:	
Instalment credit business (M)	Aug. 12, 1971
International trade credit (A)	April 14, 1971
ECGD business (Q)	June 9, 1971
Electronics capital equipment deliveries, research and development (Q)	Aug. 26, 1971
Engineering and electrical goods:	
Deliveries and orders (M)	Aug. 26, 1971
Film industry:	
British Film Fund Agency returns (M)	Sept. 16, 1971
Cinema admissions and takings (M)	Sept. 16, 1971
Overseas payments and earnings (A)	Aug. 5, 1971
Registration of films (A)	Feb. 24, 1971
Trends in film going (A)	Aug. 19, 1971
Food:	
Consumption levels (6-M)	July 15, 1971
Household consumption (Q)	July 15, 1971
Footwear industry production, orders and deliveries (M)	Sept. 2, 1971
Foreign trade:	
EFTA trade (Q)	Sept. 16, 1971
Industrial countries trade and production (Q)	Aug. 5, 1971
World exports of manufacturers (A)	Sept. 30, 1970
Foreign trade of the UK:	
Direct exports (A)	April 14, 1971
Unit value and volume index nos. (M)	Sept. 16, 1971
Value of overseas trade (M)	This week
Value of overseas trade: analysis of trends (Q)	Aug. 5, 1971
Gold and convertible currency reserves (M)	Sept. 9, 1971
Hairdressing trades turnover (M)	Sept. 16, 1971
Hire purchase business (M)	Sept. 16, 1971
Industrial building (Q)	July 29, 1971
Industrial development certificates refused (A)	July 15, 1971
Industrial production:	
Index nos. (M)	This week
N. Ireland index (M)	Sept. 9, 1971
Wales index (Q)	This week
Insurance companies assets (A)	Aug. 12, 1971
Investment:	
Book values of overseas direct investments (every 3 years)	Sept. 23, 1970
Industry's investment intentions (3 times a year)	June 16, 1971
Investment and earnings overseas (A)	April 7, 1971
Laundries and dry cleaners turnover (M)	Sept. 16, 1971
Machine tools deliveries and orders (Q)	Sept. 16, 1971
Man-made fibres:	
Analysis of production (Q)	Aug. 12, 1971
Deliveries (Q)	Aug. 12, 1971
Production (M)	This week
Volume of production (M)	Aug. 12, 1971
Motor industry:	
Car and commercial vehicle production (M)	Sept. 2, 1971
Motor trades turnover (M)	Sept. 16, 1971
Office development permits (Q)	Sept. 2, 1971
Partnerships registered (A)	Jan. 27, 1971
Pension funds: assets (A)	Aug. 26, 1971
Retail prices index (M)	This week
Retail trades:	
Index nos. (M)	Sept. 16, 1971
N. Ireland index (M)	Aug. 19, 1971
Royalty transactions (A)	Mar. 31, 1971
Shipping:	
Nationality of vessels in UK sea-borne trade (A)	Feb. 10, 1971
Steel consumption (Q)	Sept. 16, 1971
Stocks:	
Distributive and service trades (A)	April 28, 1971
Industry's stocks (Q)	Sept. 16, 1971
Retail (M)	Sept. 16, 1971
Television:	
Overseas payments and earnings (A)	Aug. 5, 1971
Textiles:	
Clothing and textile orders and deliveries (M)	Sept. 9, 1971
Cotton production (M)	Sept. 9, 1971
Hosiery production (M)	Aug. 19, 1971
Wholesale houses sales (M)	Sept. 16, 1971
Wool exports (Q)	Sept. 9, 1971
Wool output (M)	Sept. 9, 1971
Tourism:	
International tourism (A)	Sept. 23, 1970
UK tourist traffic (M)	Sept. 16, 1971
Wholesale prices:	
Average prices of selected commodities (A)	Feb. 24, 1971
Index nos. (M)	This week

Dept. of Trade and Industry organisation, etc.

Subjects	Last published
British commercial representatives overseas	June 30, 1971
Business Monitor titles	Aug. 26, 1971
Customs notices of interest to exporters	Sept. 2, 1971
Directory of DTI (formerly BOT) departments and their work	April 8, 1970
DTI addresses (former BOT offices)	Mar. 3, 1971
DTI Regional Directors	Mar. 3, 1971
ECGD local offices	Sept. 9, 1971
Index Jan.-Mar. 1971	May 26, 1971
Official receivers offices	May 20, 1970
Programme of trade promotions	July 22, 1971
Release dates of economic statistics	This week

The economy: selected indicators

Series expressed as index numbers and seasonally adjusted except where shown otherwise

SYMBOLS USED IN ALL STATISTICAL TABLES—

. . not available	r revised
– nil or less than half the final digit shown	* five week period
p provisional	ø fifty-three week period

	Gross Domestic Product (Expenditure estimates)	Index of Industrial Production	Consumers' Income and Expenditure				Fixed Capital Expenditure					Increase in Stocks			
							Total	Selected Components				Total	Selected Components		
			Personal disposable income	Total consumers' expenditure		Retail sales		Manufacturing industry	Distributive and service industries	Dwellings	Public sector excluding dwellings		Manufacturing industry	Whole salers	Retailers
	at 1963 prices		at current prices		at 1963 prices	at 1966 prices	at 1963 prices					at 1963 prices			
Base of index	1963	1963	1963	1963	1963	1966	1963	1963	1963	1963	1963				
£m in base year	26,758		21,758	20,087	20,087	11,372	4,907	1,070	994	944	1,752	Series in £ million			
1965	108	111.7	115	114	106	. .	121	124	119	127	117	385	263	47	31
1966	110	113.2	122	121	108	100.0	124	128	115	128	125	254	143	25	17
1967	112	113.9	127	126	110	101.4	133	124	122	138	142	184	–37	13	22
1968	116	119.8	135	135	112	103.6	140	131	144	145	142	157	23	75	41
1969	118	122.9	143	143	113	103.0	136	140	148	130	131	357	232	26	27
1970	120	124.1	156	155	116	104.2	139	152	157	117	136	344	214	42	51
1969 2nd qtr	118	123.1	142	142	113	103.7	135	141	147	130	129	84	41	2	5
3rd qtr	119	123.2	144	144	113	103.2	138	145	155	130	130	51	4	10	8
4th qtr	120	123.3	147	147	114	102.9	138	145	153	126	131	126	74	2	—
1970 1st qtr	117	123.8	149	148	114	103.3	133	145	146	112	133	–31	42	1	–32
2nd qtr	120	123.5	155	153	116	104.2	142	153	163	118	137	106	55	12	26
3rd qtr	120	124.3	159	158	117	104.6	139	154	156	119	133	117	44	7	14
4th qtr	122	124.6	163	161	118	104.7	122	157	165	119	139	152	72	23	44
1971 1st qtr	116	124.5	164	161	116	101.9	137	147	148	114	148	43	70	2	–62
2nd qtr		126.3				104.3		141 p	159 p				–116 p	14 p	38 p
Jan		126.8				102.7									
Feb		123.6				99.7									
Mar		123.1				103.0									
Apr		126.4				104.7									
May		126.1				104.9									
Jun		126.4				103.4									
Jul		125.6 p				105.0									

	Orders	Prices and Costs					Labour			Trade (§)		Balance of Payments current balance
	Engineering and electric goods† orders on hand (end period)	Retail prices Index		Wholesale price index: non-food manufacturing industry		Basic hourly wage rates (all industries and services)	Wholly unemployed excluding school leavers	Unfilled vacancies for adults	Civil employment	Imports (‖)	Exports (¶)	
	at 1963 prices	Index‡	% increase on year earlier	Basic materials and fuel used‡	Manfactured products home sales‡		Mid-month or monthly average		Quarter or quarterly average	at current prices		
Base of index	Dec 1963	Jan 16, 1962		1963	1963	Jan 31, 1956				1963	1963	Series in £ million
£m in base year							Series in thousands			4,362	4,282	
1965	119	112.1	*4.8*	106.8	104.6	157.9	308	265	24,784	116	112	–52
1966	115	116.5	*3.9*	110.2	107.3	168.5	323	255	24,835	120	121	83
1967	106	119.4	*2.5*	108.4	108.2	175.3	512	174	24,476	130	120	–298
1968	106	125.0	*4.7*	120.5	112.4	187.3	541	188	24,331	159	146	–288
1969	117	131.8	*5.4*	125.0	115.9	197.4	535	200	24,304	165	165	440
1970	125	140.2	*6.4*	128.5	124.6	217.7	574	186	24,135	181	184	579
1969 2nd qtr	113	131.8	*5.4*	124.2	115.1	195.6	519	202	24,332	165	163	90
3rd qtr	115	132.0	*5.0*	126.1	116.5	197.8	547	200	24,285	165	171	172
4th qtr	117	133.7	*5.1*	127.3	118.0	201.6	544	199	24,249	169	172	167
1970 1st qtr	118	136.2	*5.0*	130.1	120.6	209.0	561	192	24,275	171	180	206
2nd qtr	122	139.5	*5.8*	129.2	123.6	214.0	563	187	24,138	183	183	113
3rd qtr	123	141.1	*6.9*	126.9	125.7	219.5	592	185	24,072	178	175	69
4th qtr	125	144.0	*7.7*	127.8	128.4	228.3	581	177	24,054	190	199	191
1971 1st qtr	120	147.9	*8.6*	131.2	131.7	237.5	631	146		189	186	79
2nd qtr	117 p	153.2	*9.8*	137.2 p	134.8 p	242.2	725	131		199	209	237
Jan	122	147.0	*8.5*	129.8	130.8	237.1	613	157		174	175	
Feb	120	147.8	*8.5*	130.6	131.7	237.4	623	147		187	172	
Mar	120	149.0	*8.8*	133.2	132.6	238.1	656	134		207	211	
Apr	118 p	152.2	*9.4*	137.2	134.0	239.2	704	129		200	208	
May	118 p	153.2	*9.8*	137.3	135.0	242.7	731	130		193	204	
Jun	117 p	154.3	*10.3*	137.4	135.9	245.0	740	133		203	216	
Jul		155.2	*10.1*	138.9 p	136.7 p	246.6 p	788	122		198 p	214 p	
Aug				139.1 p	137.2 p		799	123		193 p	216 p	

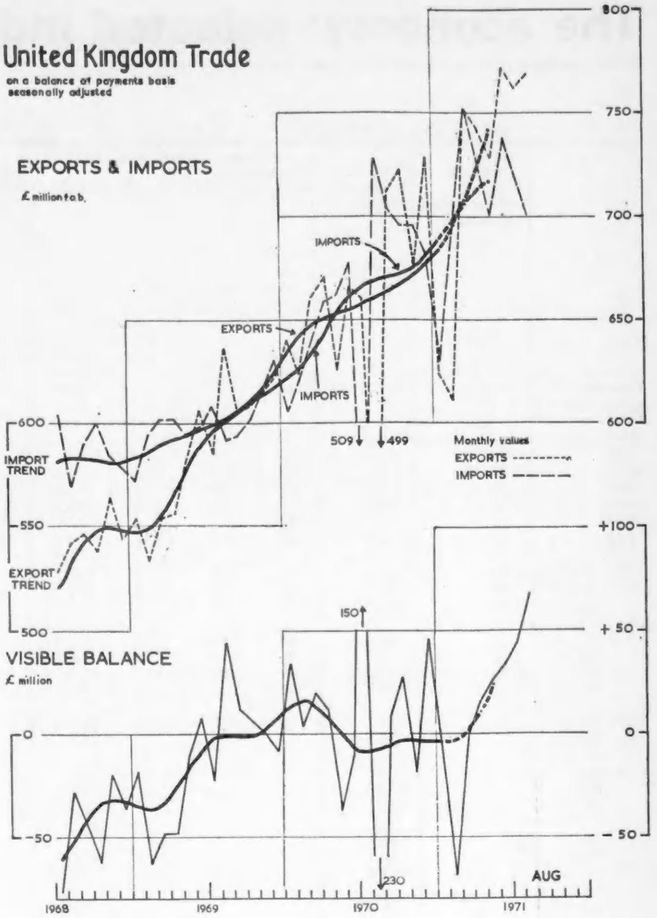
(†) New series covering SIC Orders VII-IX: previous series also included part of Order XI. (‡) Not seasonally adjusted
(§) On a balance of payment basis. (‖) Includes payments for United States military aircraft and other balance of payments adjustments
(¶) Includes balance of payments and allowances for factors affecting recording

United Kingdom trade in August

Summary

General Assessment In August there was a surplus on visible trade of £68 million† seasonally adjusted. This result, as in the two previous months, reflected the recent strong growth of exports coming at a time when the level of imports continued to be restrained. For the first eight months of 1971 the surplus averaged £14 million a month, seasonally adjusted, compared with a position close to balance for 1970 as a whole. With net invisible earnings estimated to have been at a rate close to £50 million a month, the current account has continued in substantial surplus.

Exports The value of exports in August was £769 million† on a balance of payment basis, seasonally adjusted. For the first eight months of this year taken together, exports averaged £720 million a month, 8 per cent higher than the monthly average in the second



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† All figures in this article for exports (except recorded figures in Table 4 and area and commodity analyses in Tables 5 and 6) and, in consequence, for the visible balance include from January 1970 an addition of 2 per cent to the value of exports as an allowance for under-recording (See Note 1(e)).

TABLE 1. VISIBLE TRADE ON BALANCE OF PAYMENTS BASIS

Seasonally adjusted values¶ £ million per month

		Exports (fob)††	Imports (fob)‡‡	Visible balance
1969		588	600	−12
1970		657	657	+ 0
1969	1st quarter	547	590	−42
	2nd quarter	582	598	−16
	3rd quarter	610	598	+12
	4th quarter	615	615	− 0
1970	1st quarter	642	623	+19
	2nd quarter	654	666	−12
	3rd quarter	623	647	−24
	4th quarter	709	691	+18
1971	1st quarter	663	687	−24
	2nd quarter	748 r	722 r	+26 r
	March	752	752	− 0
	April	743 r	727 r	+16
	May	728 r	701 r	+27 r
	June	772 r	737 r	+35 r
	July p	762	718 r	+44 r
	August p	769	701	+68
	March-May	741	727	+14
	June-August p	768	719	+49

¶ Components and totals are rounded independently.
†† Includes balance of payments adjustments and allowance for factors affecting recording (see Table 2).
‡‡ Includes payments for US military aircraft and other balance of payments adjustments (see Table 3).
p Provisional estimates.
r Revised estimates.

TABLE 1A. Three-monthly averages ||

		Exports (fob)††	Imports (fob)‡‡	Visible balance
1970	September	623	647	−24
	October	644	709	−65
	November	704	698	+ 5
	December	709	691	+18
1971	January	677	669	− 7
	February	655	664	− 9
	March	663	687	−24
	April	702	720	−17
	May	741	727	+14
	June	748	722	+26
	July	754	719	+35
	August	768	719	+49

||Average of month shown and two preceding months (see Note (1d)).

TABLE 2. EXPORTS

Seasonally adjusted values¶ £ million per month

		Overseas trade statistics basis §§ (fob)	Coverage adjustments	Net allowance for factors affecting recording†	Balance of payments basis (fob)
1969		612	−27	+ 4	588
1970		672	−28	+13	657
1969	1st quarter	562	−26	+12	547
	2nd quarter	600	−30	+12	582
	3rd quarter	640	−24	− 6	610
	4th quarter	645	−27	− 3	615
1970	1st quarter	655	−26	+13	642
	2nd quarter	669	−29	+13	654
	3rd quarter	638	−27	+13	623
	4th quarter	726	−31	+15	709
1971	1st quarter	678	−29	+14	663
	2nd quarter	766	−34 r	+15	748 r
	March	769	−32	+15	752
	April	761	−34 r	+15	743 r
	May	746	−33 r	+15	728 r
	June	790	−34 r	+16	772 r
	Julyp	774	−27	+15	762
	August p	780	−27	+16	769
	March-May	759	−33	+15	741
	June-August p	781	−29	+16	768

¶ Components and totals are rounded independently.
§§ These values are derived from the recorded values in Table 4 by the standard seasonal adjustment process.
† See Note 1(e).
p Provisional estimates.
r Revised estimates.

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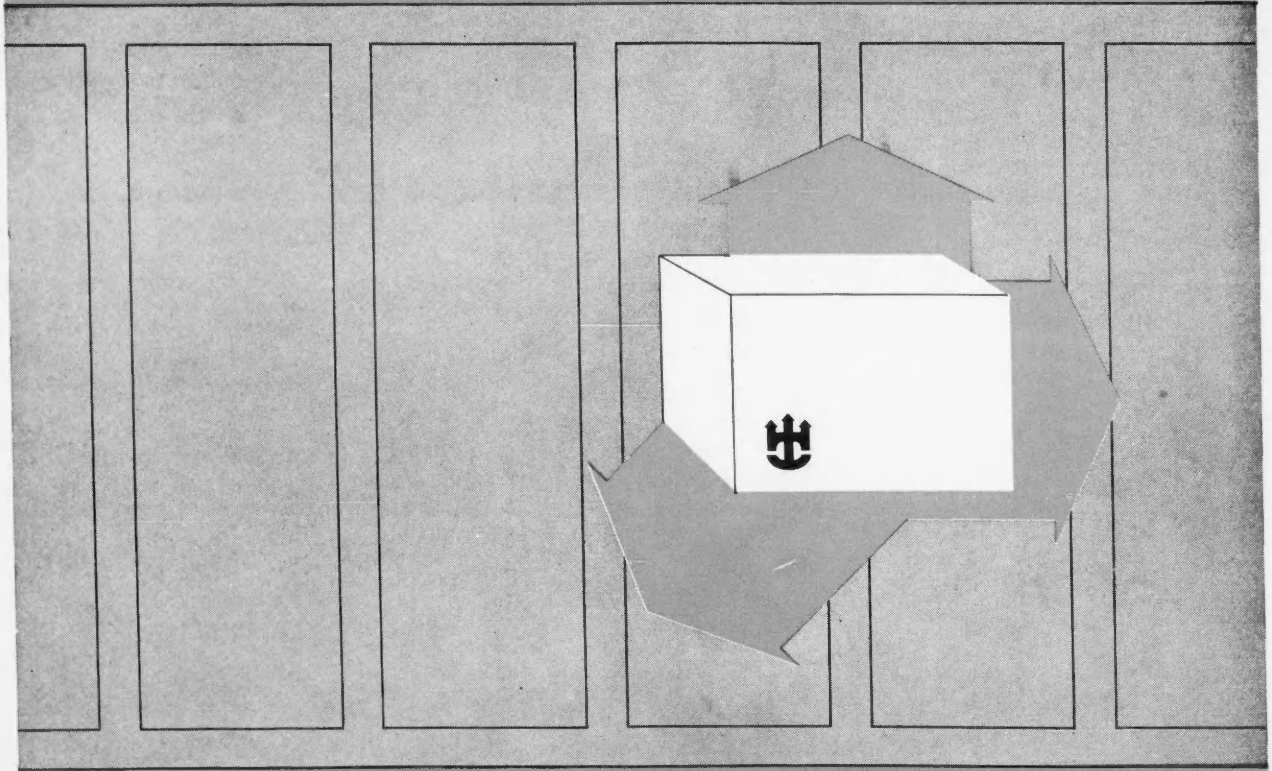

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Further information in Great Britain:
Exhibitions & Trade Fairs International Ltd., 10 Clifford Street, London W1X 2AQ. 734 0511.

Sea, air, road and rail freight systems link at Interfreight '71

BRITAIN's export-import industry will have a remarkable opportunity of learning about the latest cargo-moving techniques—all under one roof at the same time—at the International Freight Show and Conference to be held at London's Earls Court centre from September 28 to October 1.

The exhibition—Interfreight '71—is to be opened by the Parliamentary Under-Secretary of State for Trade and Industry, Mr. Nicholas Ridley.

Interfreight '71 is an amalgamation of the former Ports and Terminals Freighting Exhibition, originally planned for Manchester this year, and the International Freight Container and Container Handling Exhibition which would have had London as its venue. Concurrently with Interfreight '71, there will be an international freight industry conference, the nucleus of which will be the former Ports and Terminals conferences of 1967 and 1968, which employed a successful 'face-to-face' panel system.

Integration is the theme of Interfreight '71 because that is now the theme of the freight transport industry itself. As cargo units become more and more standardised, so the air and shipping lines, the international road hauliers and the railway authorities need to co-operate more closely to achieve the door-to-door delivery of freight.

Cross-section of facilities

With almost 100 exhibitors from the United Kingdom and abroad, the exhibition will show a representative cross-section of available facilities, but at the same time it will demonstrate the keen competition between the different transport modes to win bigger load factors. The airlines for example will be showing in a combined Air Cargo Centre display how they are working to meet the threat from the big, fast containerships on the deepsea routes and from the drive-on/drive-off ferries on the shortsea routes.

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Unloading cargo from a BOAC 747 at London's Heathrow airport.

CODING ZONE
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Sorting and coding freight at BEA's Heathrow Cargocentre Europe.

BOAC, the biggest exhibitor at the show, will be making use of their space with an exhibit set in a 'spaceship' with an 'airlock door': visitors will be able to walk along space corridors to study mock-ups of a Jumbo 747 hold. BOAC have chosen space as the theme for their stand to emphasise the huge cargo capacity being provided by its fleet of Boeing 747s of which it has more than any airline outside the US.

A wide range of containers and equipment for shippers and forwarding agents will be on show and there will be a daily 'space shuttle service' to take exhibition visitors to Heathrow Airport for a tour of BOAC's cargo facilities. Highlighted is the airline's distribution system, including the door-to-door service maintained by 350 distributor agents in Britain. BOAC's scheduled road services from industrial centres to major airports will also be fully described. Experts from Africa, America, Canada, Japan, Australia and Hong Kong will be there to discuss import arrangements in the countries.

British European Airways are showing their paces with an exhibit designed to illustrate not only their huge freight capacity out of Heathrow Airport—both on their cargo-only Merchantman craft and on scheduled passenger flights—but also their growing network of special cargo services from most of the important provincial cities.

Europe's biggest all-cargo airline, Transmeridian Air Cargo Ltd., will be stressing, with an impressive model, the huge capacity of the CL-44 Swingtail aircraft and of its even bigger brother the Guppy 'Skymonster', which are the mainstay of the fleet. The airline will be illustrating their latest route—into North and South America via Bermuda, with fast roll-on/roll-off ferries carrying the freight to Miami for onward shipment.

Two more of Britain's cargo-only airlines—a booming new industry on the British aviation scene—have also taken stand space. The September exhibition date is particularly appropriate to Sagittair, because this month the first of the airline's four Argosy freighter aircraft will be seen flying in their new colours. Sagittair's stand shows the full front mock-up of the huge freight door of the 12-ton Argosy, to give exporters the

(continued on page iv)

FREIGHT SYSTEMS LINK AT INTERFREIGHT '71

continued

chance to make an on-the-spot appraisal of the aircraft's potential.

Another all-cargo airline, Tradewinds Airways Ltd., will illustrate the versatility and cargo rates of their fleet of CL-44 Swingtails. Although specialising in long-haul work, Tradewinds operate to any destination.

Other airlines on show include Air Canada and Varig, the Brazilian carrier. And, in addition to the airlines, there are manufacturers of air cargo handling and container equipment at the exhibition, as well as the men who generate the bulk of the airlines' cargo—the forwarders.

British Rail is one of the busiest shortsea shipping lines in the world. On their stand at Interfreight '71, the British Rail Shipping and International Shipping Services Division will be illustrating their wide variety of services: from the roll-on/roll-off links to Europe and Ireland, the train ferry services to Europe, the container services to Europe, Ireland and the Channel Islands, to their participation in the Europe-wide Intercontainer service—which runs high-speed container train services between key capitals—and Interfrigo—the inter-European service for the carriage of perishables in refrigerated rail containers. Emphasis will be laid on BR's high-speed container service between Harwich and the Continent. And there will be news of new freight routes from Folkestone and Fishguard; new ships, in association with the Belgian Marine and French Railways.

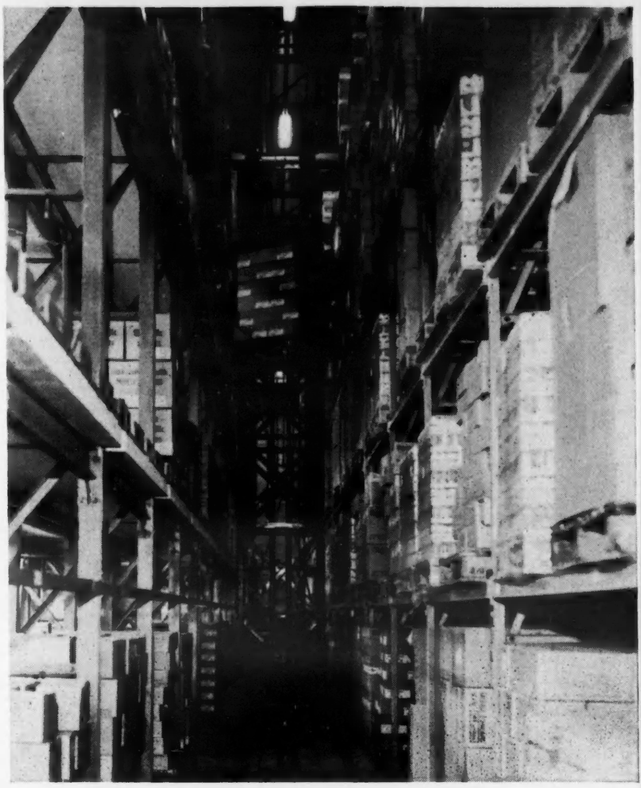
Ferry and container services

Container trains within Britain are run by British Rail's associated company, Freightliners Ltd. Their stand features the nationwide containertrain services and the maritime routes to ports and to Ireland. At the stand, there will, in fact be news of new services in the network serving Ireland. One in three of all the containers Freightliners carry is engaged in international trade.

Typical of the high-speed ferry and container services on the highly competitive North Sea routes is the operation of North Sea Ferries Ltd., who operate from Hull to the Continent, via Europort (Rotterdam). Successful in the past as ferry operators, NSF will be stressing the introduction on October 29 of a new container service. Their stand will display a model of a new portainer crane erected by the British Transport Docks Board at the new Elizabeth Dock at Hull.

Geest Line Industries Ltd. will be showing details of their cargo service to Barbados and the Windward Islands, their

(*continued on page vi*)



The Lansing Bagnall turret truck system is used in locations throughout the world. The truck can rotate its load through 180 degrees for stacking on either side of the aisle.

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The container policy of the French Railways.

An ever increasing number of transcontainers are being transported through France by rail. The main points of entry and exit are the large sea ports, chiefly Le Havre, Marseille and Dunkerque, the first two dealing essentially with deep sea trade, the last one with short sea traffic, mainly with the United Kingdom by means of the new container ship "Transcontainer 1" of the French National Railways.

There are approximately 50 stations in France which can handle 20 ft. transcontainers, 22 of which are equipped for the handling of 30 ft. and 40 ft. units.

For traffic within France a new type of service, known as "Container Express", was introduced in June 1969. This provides *overnight* transport of containers between seven of the largest and economically most active cities in the country: PARIS, BORDEAUX, LYON, MARSEILLE, METZ, STRASBOURG and TOULOUSE.

For traffic with overseas countries the tariffs offered by the French Railways are particularly advantageous, with a flat rate for each type of loaded container for any given distance regardless of weight and commodity, and with a low rate for the empty return of privately owned containers.

Better rates still can be obtained through the French Railways' container company, the "Compagnie Nouvelle de Cadres" (C.N.C.), which, by means of container groupage and a large volume of traffic, is able to reduce costs to a minimum and passes on the savings thus achieved to its customers. The C.N.C. can arrange terminal operations and transport in France or give quotations for traffic from the United Kingdom.

The containerisation policy of the French Railways does not restrict the development of other services. This means in particular that the services traditionally offered to shippers will be maintained. These include the traffic in ferry wagons from Dunkerque to Dover and Harwich which carry the majority of the fruit and vegetables moved by rail between Southern Europe and the United Kingdom.

Via the Newhaven-Dieppe route, the traditional traffic in British Rail containers may in time be modified to suit new requirements but the principle of a service for small containers by this route will be retained.

On all their joint routes, the French Railways and British Rail will continue to give the closest attention to the important roll-on/roll-off traffic which has in the last few years shown a remarkable rate of increase. An important part of this traffic is now carried across France, to the south of the country or to Italy, by "Kangaroo" trains operated by "Novatrans" a piggyback transport company closely associated with French Railways.

For additional information on all these services get in touch with French Railways Ltd., (Freight Dept.), 179 Piccadilly, London, W1V 0BA. Telephone 01-493 1621. telex 24651.

The new roll-on/roll-off container ship "TRANSCONTAINER 1" of the French Railways in service on the Harwich-Dunkerque route.

TRANSCONTAINER 1

FREIGHT SYSTEMS LINK AT INTERFREIGHT '71

continued

container service to the Continent (from Ipswich to Massluis, Holland) and the Geest road transport service.

Among British ports on show will be Dover, the port that accommodates Europe's biggest shortsea operator, Townsend-Thoresen. Dover will be illustrating its proposed £2½ million development scheme to provide yet another car ferry berth and more sophisticated roll-on/roll-off freight facilities. The Medway Ports Authority will be showing details of its purpose-built terminal for LASH (lighter-aboard-ship) terminal at Sheerness—the only one of its kind in Europe—and of the construction of two new deep-water berths, also at Sheerness. Other ports exhibiting include Dunkirk, in France, and Malmo, in Sweden.

The privately-owned terminal operators and road hauliers Samuel Williams and Sons Ltd., will be prominently featuring their modern bulk handling port at Dagenham, 12 miles east of London Bridge, and their UK-wide fleet of 300-plus vehicles which gives a national road haulage service, with an annual load of three million tons and a fleet mileage of approximately 10 million miles a year.

Mechanical handling equipment

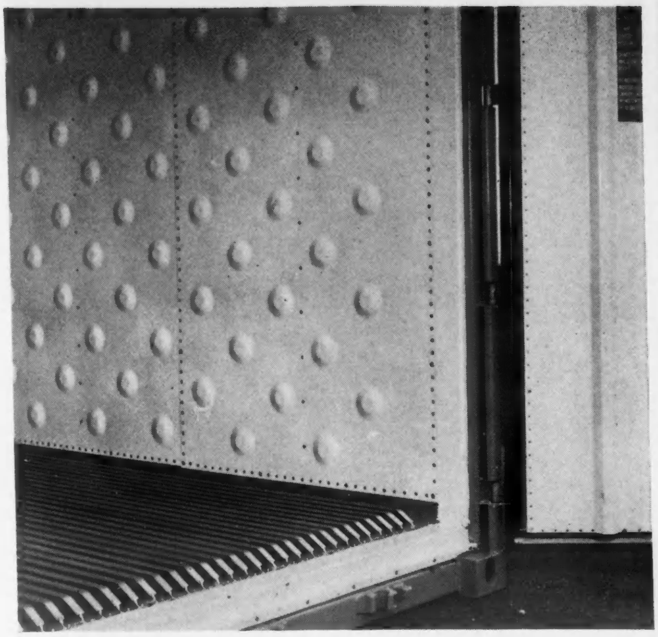
Equipment for the transport service companies will also be well in evidence at the show. Mechanical handling equipment manufacturer names include Lansing Bagnall Ltd., of Basingstoke, Hants., who will have on show a wide range of industrial trucks for applications in ports and terminals. Battery-electric forklift and reach trucks, pallet transporters and tow-tractors will be demonstrated in simulated conditions.

Matbro (Sales) Ltd., of Horley, Surrey, will be showing a representative selection from their range of battery- and engine-driven forklift trucks.

But the variety of Interfreight '71 is considerable. Other exhibitors include manufacturers of containers, container components, lashing equipment and loading gear; forwarding agents and staff consultants; telecommunications and banking services. A feature of the exhibition is the appointment of freight systems experts—Modern Materials Management Ltd. —as official consultants to act as advisors to visitors to the exhibition.

Organised jointly by the Society of Motor Manufacturers and Traders, Iliffe Exhibitions Ltd., and Maclean-Hunter Ltd., Interfreight will in future be held every two years.

For further information on INTERFREIGHT '71, contact John Daniels, Maclean-Hunter Ltd., 30 Old Burlington Street, London, W1X 2AE. Telephone: 01-437 0644.



Interior of a Freight Bonallack 20-ft. 'Coldsaver' ISO insulated container as supplied to shipping lines. The 'T' section floor and dimpled lining promote air circulation.

A Clark Equipment van carrier working at the Southampton container berth. The carrier which can straddle up to three 10 ft. high containers, is loading a container of liquid helium onto a road trailer.

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Face-to-face on freighting problems

SPEAKERS from all fields of cargo transportation—air, sea, road and rail—and export/distribution executives from well-known companies wil come face-to-face at the two-day conference to be held on September 29, and 30 in conjunction with Interfreight '71.

The face-to-face confrontation (there are no set papers) follows the pattern of two highly successful conferences on the same lines, at Brighton in 1967, and Manchester in 1969. Providers of freight and export/import services face their customers, state their opinions and try to resolve mutual problems under the direction of a team of panel chairmen. Ample opportunity will be provided for delegates to take part in the discussions.

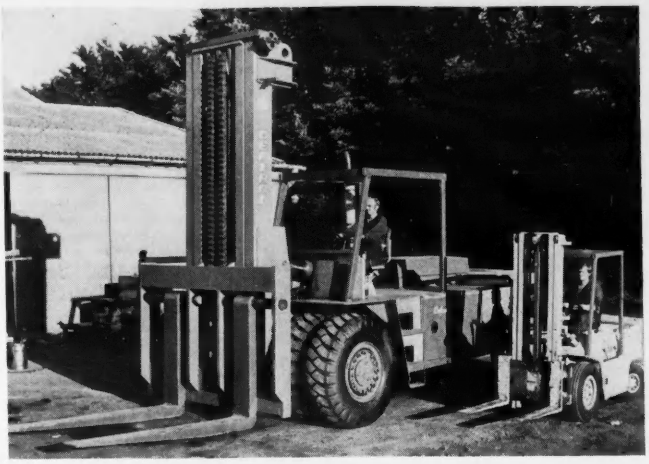
Speed on the ground

This year, the conference opens with a session entitled 'Speed on the ground—is there enough of it?' on the Wednesday morning, followed in the afternoon by one called 'Containerisation: how can it go wrong?' Both sessions are under the chairmanship of Sir Andrew Crichton, chairman of Overseas Containers Ltd.

The service providers in this case are: Mr. J. Reid, chief executive of the Containerbase Federation Ltd., an organisation that has set up inland centres for the handling and distribution of container cargoes in a bid to beat the bottlenecks; Mr. Tim O'Leary, national secretary of the Docks and Waterways Group of the Transport and General Workers Union; Mr. T. Torrence, director and general manager of Stothert and Pitt Ltd., the Bath-based crane makers; and Mr. R. Hilton, chairman and managing director of Hilton Transport Services, one of Britain's biggest international road hauliers. Users are: Mr. J. Williams, director of the National Materials Handling Centre; Mr. R. Galer, director of the Centre for Physical Distribution Management; and Mr. J. Murray, distribution manager of the Singer Manufacturing Co.

The second panel session on containerisation pinpoints the problems of the shipping lines and terminal operators who have invested millions in the new transport system and now have to recoup them. Providers here are: Mr. D. B. Hall, managing director of Dart Containerline Ltd., a Belgian-British-Canadian consortium which runs containership services between Europe, Britain and North America; Commander C. Gwinner, managing director of CTI—Container Transport (Great Britain) Ltd., container leasers; Mr. D. Neighbour, Director of General Steam Navigation Co. Ltd., which runs short-sea services between Britain and the Continent; and Mr. W. I. Green, sales director of Crane Fruehauf Trailers, one of Britain's biggest container manufacturers. Users are: Mr. M. Howard, managing director of Michael J. Howard Agencies Ltd., a forwarding agency; Mr. G. R. Bathe, overseas distribution manager of Beecham Research International; Mr. G. H. A. de Wit, managing director of Kuehne & Nagel Ltd., a forwarding agency; and Mr. A. H. Williams, marketing administration manager of the international division of Wilkinson Sword Ltd.

British Railways Eastern Region m.v. Cambridge Ferry *leaving Harwich*



Largest and smallest in the SD 'Defiant' lift truck range. The latest addition, on the left, has a 27-ton capacity.

Aviation's turn

On the Thursday morning it is aviation's turn, and the subject for discussion will be 'Can airfreight win—or will the prices fly too high?' The chairman is Mr. John Emery, president of the Emery Air Freight Corporation, the world's biggest airfreight forwarder.

Providers are: Mr. John Guy, cargo director of British European Airways; Mr. E. Dreyfous, general manager of cargo for the UK and Eire, Air France; and Mr. W. Koster, cargo manager, Europe, British Overseas Airways Corporation. Users are: Mr. D. Spice, managing director of Pandair Freight Ltd., a big cargo forwarder, and also part of the P & O Group; Mr. L. S. Gray, general manager for Great Britain of international forwarders Air Express International; and Mr. J. Murray, distribution manager of the Singer Manufacturing Co. Ltd.

The final session, called 'Do shippers really know what they want?' has on the providers panel: Mr. J. Clarke, cargo sales manager, Europe, of Qantas Airways, Australia's national airline; Mr. D. J. Cobbett, assistant managing director of Freightliners Ltd., the company that runs Britain's container train network; and Mr. M. Howard, managing director of Michael J. Howard Agencies Ltd. Users are: Mr. R. Salisbury-Jones, export marketing managing of Rolls-Royce Ltd.; Mr. G. R. Bathe, overseas distribution manager, Beecham Research International; Mr. A. H. Williams, marketing administration manager, international division, Wilkinson Sword Ltd.; Mr. D. G. Bounden, European shipping co-ordinator, Mobil Services Co. Ltd.

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Exhibitors at Interfreight '71

Stand numbers are given in brackets

Abel Systems Ltd. (AC10).
Air Canada (AC22).
AIR (Air Conditioning & Refrigeration) Ltd. (67).
Arbuckle Smith & Co Ltd. (97).
The Banner Church Organisation Ltd. (AC12).
Barclays Bank Ltd. (8).
BEA Cargo (AC2).
G. Beare & Son Ltd. (28).
George Blair & Co Ltd. (29).
BOAC (AC4).
Bowater-Stevenson Containers Ltd. (33).
British Air Ferries (AC23).
British Rail Services & International Shipping Division (91).
British Waterways Board (59).
Butlers Warehousing & Distribution Ltd. (82).
W. P. Butterfield (Engineers) Ltd. (39).
P. C. & C. K. Chase Ltd. (79).
Clark Equipment—IT Division (80).
Commercial Air & Sea Services Ltd. (AC16).
Commercial Motor (4).
Container & Pressure Vessels Ltd. (76).
Containerbase Federation Ltd. (84).
Container Manufacturers—Ireland Ltd. (2).
B. Dixon-Bate Ltd. (37).
F. L. Douglas (Equipment) Ltd (AC3).
Dover Harbour Board (38).
F. T. Everard & Sons (Management) Ltd. (81).
The Felixstowe Dock & Railway Co Ltd. (32).
Freight Bonallack Ltd. (50).
Freightliners Ltd. (52).
Freight Management (6).
Geest Industries Ltd. (73).
Michael Gibbons & Co Ltd. (22).
Grenco NV (45).
Holvrieka International NV (53)
G. Hunter (London) Ltd. (66).
International Aviation Services (AC17).
International Freighting Weekly (7).
International Vehicle Testing Station (101).
Janes Yearbooks (AC19).
Joloda Transport Equipment Ltd. (63).
The Journal of Commerce & Shipping Telegraph Ltd. (24).
Lansing Bagnall Ltd. (42).
Link Shipping Staff Consultants (21).
London Telephones (11).
Matbro (Sales) Ltd. (48).
Mechanical Handling (4).
Medway Ports Authority (34).
Modern Materials Management (10).
Wm. H. Muller & Co (Batavier) Ltd. (104).
The National Westminster Bank Ltd. (5).
Newland Engineering Co Ltd. (83).
Norfolk Line Ltd. (74).
North Sea Ferries Ltd. (9).
Norwegian Journal of Commerce & Shipping (15).
Odra Shipping Agency Ltd. (103).
Package Control Ltd. (19).
Pan Signs Ltd. (14).
Pengco Transport Systems Ltd. (49).
A. C. Penman Ltd. (69).
L. G. Perfect (Haulage) Ltd. (100).
Port Autonome de Dunkirk (78).
Port of Great Yarmouth (95).
Port of Malmo (25)
Quinn International Freight Consultants (31).
Rollalong Ltd. (46).
Ross & Bonnyman (Engineering) Ltd. (106).
Sagittair (AC11).
Seabourne Shipping Co Ltd. (99).
Shelvoke & Drewry Ltd. (62).
SKYTRADER/Air Marketing International (AC15).
SpanSet Inter AG (35).
Henry Spencer & Sons (98).
Stainless Steel Development Association (12).
Alexander Stephen Container Handling Equipment Ltd. (40).
Swedish Lloyd Group of Companies (AC21)
S. Taylor & Co Ltd. (13).
Tillotsons Corrugated Cases Ltd. (94).
Tradewinds Airways Ltd (AC14).
Transmeridian Air Cargo Ltd. (AC20).
Tridair Industries Ltd. (106).
Tri-Wall Containers Ltd. (AC18).
Universal Bulk-Handling Equipment Ltd. (64).
Watts Tyre & Rubber Co Ltd. (60).
Weldwork Ltd. (AC13).
Samuel Williams Thames Terminal Ltd. (96).
Winn International Containers Ltd. (102).
Yates-Barco Ltd. (71).

Export Publicity for Industry

Publicity for British exporters can often be obtained through use of the facilities of the Central Office of Information, who are concerned with collecting from Industry items suitable for dissemination overseas by way of Government information services. The COI are interested in news items, feature article material, photographs, tape recordings for radio, films for television and other screening. Contact should be made with the nearest Regional Office covering your area.

NORTHERN: Mr. A. A. McLoughlin, Wellbar House, Gallowgate, Newcastle upon Tyne, NE1 4TB (0632 27575—Telex 53277).

EAST & WEST RIDINGS: Mr. D. de M. Guilfoyle, OBE, City House, Leeds, LS1 4JG (0532 38232—Telex EconPlan 55472—message to be prefixed for COI).

NORTH MIDLAND: Mr. T. Cooban, Cranbrook House, Cranbrook Street, Nottingham, NG1 1EW (0602 46121—Telex 37572).

EASTERN: Mr. P. L. K. Schwabe, MVO, Block A, Government Buildings, Brooklands Avenue, Cambridge, CB2 2DF (0223 58911—Telex 81187).

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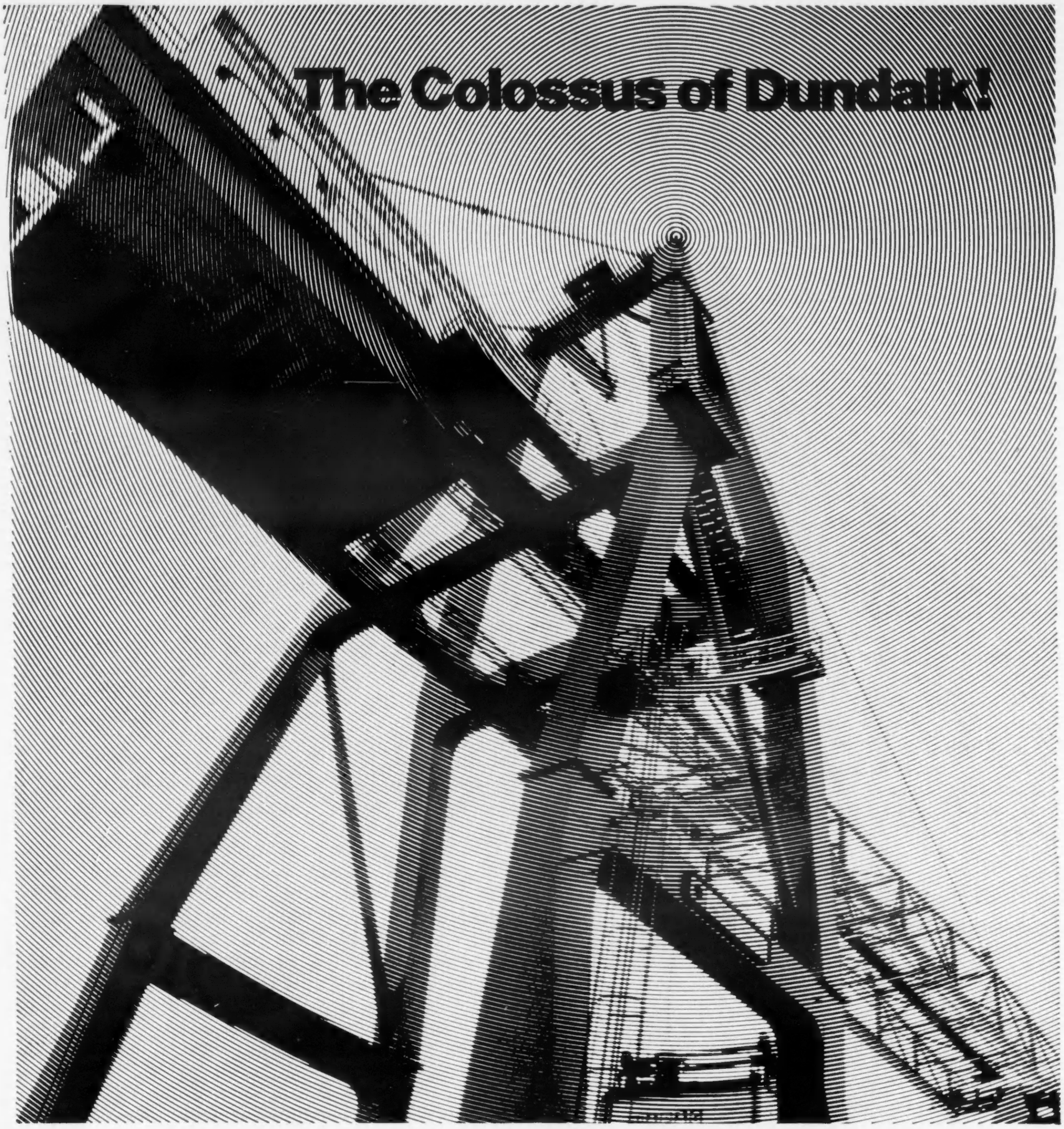

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Integrated freight operations

by K. E. Booth, MBE, BSc, CEng, MIMechE, Managing Director, Modern Materials Management Ltd.

A RELIABLE delivery service to overseas customers is an essential factor in the drive for increased export business—an efficient door-to-door freight operation provides the means to achieve this end. All out efforts are being made by sales and marketing to open up new outlets and to retain good relations with existing customers. In this endeavour, quality and price of product are obvious requirements, but getting the goods there on time and undamaged is the best way to build up a reputation.

In this article, it is not the intention to cover documentation procedures, which some might claim to be the most frustrating feature of the freighting activity, but rather the mechanics of the operation, ie the handling and transport systems.

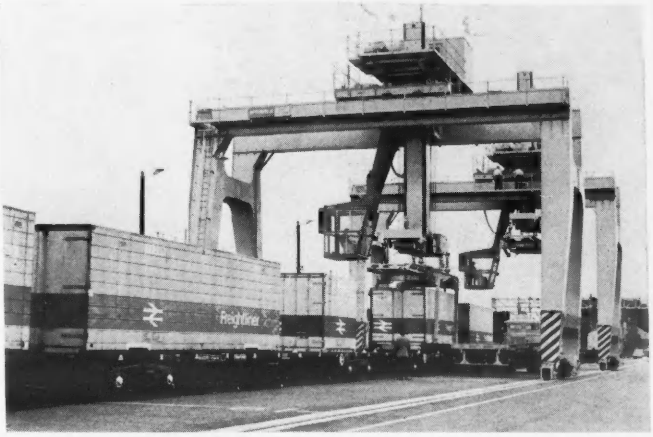
The introduction of the large freight container, suitable for movement by road, rail, sea or air, and capable of ready transfer between the various transport media, was the breakthrough which enabled significant advances to be made in achieving integrated freight networks. The objective in using a container is to maximise the size of unit load handled in a single movement when carrying out a loading, unloading or transfer operation. It also provides a unit load with more or less standard dimensional characteristics, and it is this concept which has encouraged operators providing a freighting service to introduce mechanised schemes for fast and efficient handling. Previously it was not practical or economic to utilise mechanised systems to cater for the variety of shapes and sizes which needed to be handled via a freighting network, eg the only realistic method of stowing loose cargo in a general cargo boat is by hand.

Dissimilar problems

The Americans were the first to exploit the containerisation principle for both internal and export distribution operations and, while we in this country have been able to take advantage of their experience, it has been necessary to realise that our freighting problems are not the same: certainly not for internal distribution, and in most cases not for export either. Freight operators in the United States have the advantages of volume with their large internal and external markets. We have to be much more selective in deciding where containerisation is the right answer, or where the difficulties in trying to make up a container load with mixed cargo could mean that other methods are more economic.

The first real efforts at a containerisation system for internal operations in the UK were by British Rail, the Beeching Plan for freight movement being launched in 1963. Despite initial setbacks, the Freightliner service is now well established and is expanding into cross channel freight operations. In overseas freighting, improvements and innovations continued through the mid-60s with roll-on roll-off ships and terminals, purpose-designed container ships catered for by container ports, and specialised air cargo planes. The volume of overseas containerised freight is increasing rapidly, one example being the UK/Australian trade, in which for the first full year of operation over 1 million tons was carried.

It has been the task of the materials handling systems designer to keep pace with requirement, bearing in mind that standardisation is a loose word when related to containers and other forms of unit load, and considering also the possible dangers of introducing advanced mechanised techniques too soon, with their inherent inflexibility in a changing situation. The designer has to use his ingenuity in providing equipment which can be readily adapted to handle the shapes and types of unit load likely to be presented. There are many excellent examples in the attachments designed for container and pallet pick-up by overhead or floor mounted equipment.



Unloading a British Railways Freightliner at Willesden, near London. The cranes span three rail tracks and a road vehicle lane, and can lift 30 tons.

The palletised unit load is readily amenable to movement and stacking by industrial trucks and those used for container 'stuffing' and 'de-stuffing' are of the low profile type, usually fitted with side-shift attachment. For handling pallet loads 'tween decks in cargo vessels, fork lift trucks and pallet trucks are extensively used, the modern design of fork truck for this purpose being capable of division into two parts for ease of lowering into the ship's hold by quayside cranes, which often have limited lifting capacity.

There are three basic categories of container handling equipment, eg cranes (fixed path and mobile), heavy duty fork lift trucks (counterbalanced and side loading types), and straddle carriers. In addition other special devices have been developed for self-loading and unloading of the prime mover, road, rail, sea or air.

Firm stowing

Container manufacturers have developed methods for ensuring firm and tight stowing to prevent product damage, for example inflatable dunnage, slots incorporated in the container walls to take separator strips, rings, hooks or recessed bars for lashing to the floor or sides, and supports for introducing an intermediate deck. They have also realised the advantage of all-round access with side as well as end openings, and of removable tops for loading by overhead equipment. For air cargo, containers have been designed to match the profile of the plane's fuselage.

An enormous amount of capital has been invested in

(*continued on page xiv*)

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INTEGRATED FREIGHT OPERATIONS

continued

containers and in equipment and facilities for handling and transporting them, and on many routes now the consignor is virtually obliged to use the container system or suffer excessive delays in waiting for freight space on a general purpose vehicle. The advantages of the freight container to the consignor are indisputable. They give protection to his product from pilferage and damage, and a much faster overall delivery cycle time can be achieved. Whether he finds the charges acceptable is another matter.

Where a consignment consists of palletised loads, the ideal arrangement for economic and efficient 'through handling' is to load pallets directly into the container using industrial trucks. However, in certain circumstances a disadvantage of containerised freight operations is the need to break down pallet loads of goods for loading by individual carton into the container—on the basis that usable container space would be taken up by the pallet, and there is also the difficulty of empty pallet return. This non-productive manual handling of single cartons is repeated again during unloading at the receiving point where repalletisation is often necessary. A similar situation is encountered at inland container terminals, when making up or breaking down mixed cargo. The continuing quest is for economic expendable pallets or suitable palletless strapped unit loads. Some shipping companies, notable the Norwegians, feel that the right answer is a 'floating palletised warehouse' with modern high speed methods of feeding pallets into the ship, stowing pallets inside and discharging pallets at the destination.

Flexible as possible

Transport systems must be as flexible as possible, utilising carrying vehicles most suited to the trade in which they are engaged. Thinking specifically of sea freight, both completely palletised and completely containerised ships can be viable for the appropriate type of trade and length of journey, whereas in other conditions vessels designed to accept a proportion of each type of unit load may be the right answer.

The trend towards a 'Hyper' container ship must be treated with some caution, the effect being a higher stock in transit, and possible delay in building up the complete ship load.

In this recent period of considerable but, to some extent, unco-ordinated advances, the consignor has been faced with an almost bewildering range of alternatives for handling and transporting his goods. But the ideas of integrated freight movement, which not so long ago existed only on paper, show signs of becoming reality.

The principle of maintaining the unit load, whether a single pallet or a 40-ft. container, throughout a multi-stage journey, the international standardisation of loads and methods, the trend for the total freighting activity to become controlled by one company, and the increasing use of data processing to record the identity and location of shipments, are all elements in a logical process to simplify the consignor's problem and increase the reliability of his service to his customer.

An air freight 'igloo' container being loaded. The container's profile matches that of the aircraft's fuselage.

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A low-profile forklift truck loading palletised goods into a container. Lift trucks of this type are suited to container 'stuffing' and 'de-stuffing'.

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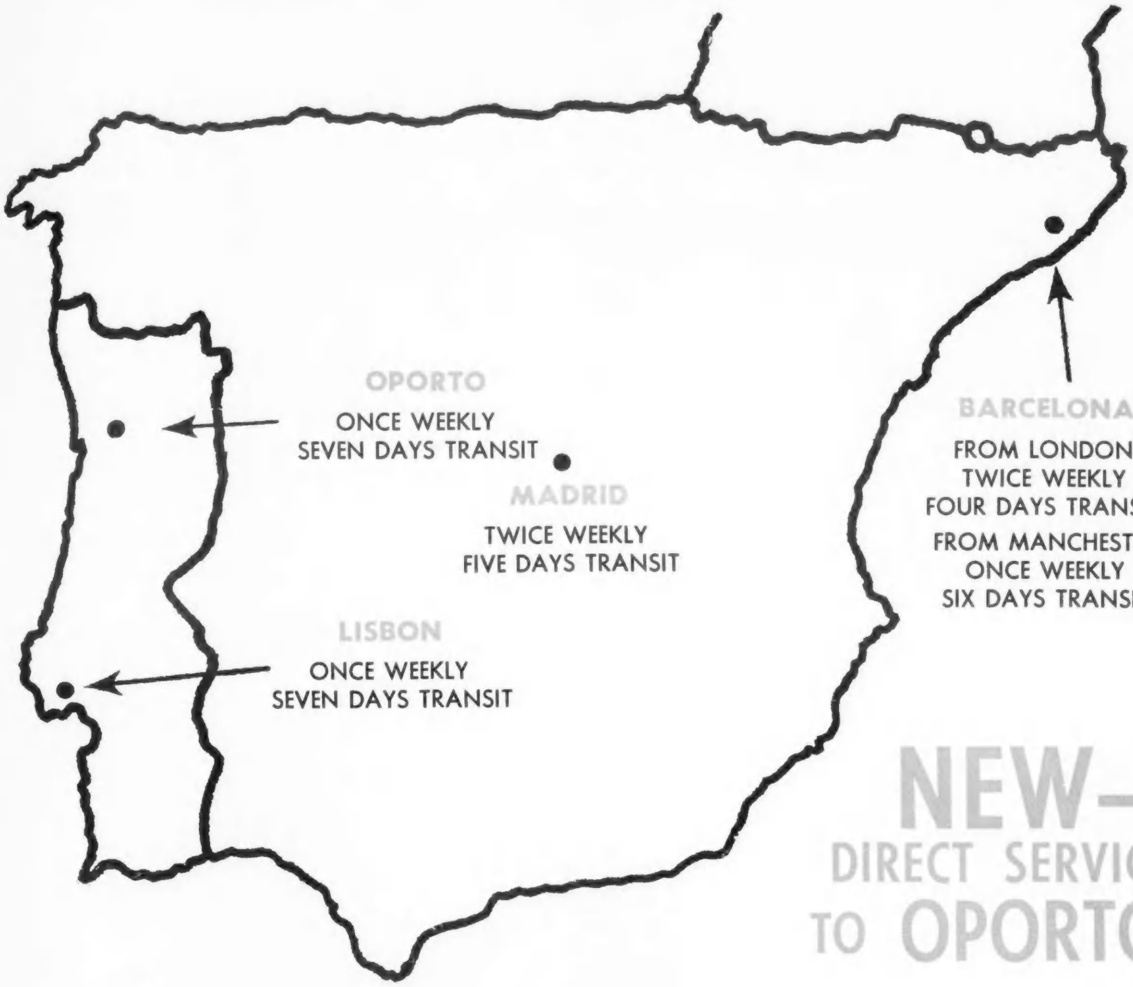
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half of last year. Of this increase nearly a half was in the volume of exports and the remainder was due to higher export prices.

Imports The import total for August was £701 million on a balance of payments basis, seasonally adjusted, not very much different from the average monthly rate for the year so far of £706 million, which was 5½ per cent higher than the average in the second half of last year; about two-thirds of this increase reflected higher import prices and the remainder an increase in volume.

Exports

General Comment The value of exports in August continued at about the high average level of the two previous months. Trade in the early months of the year was distorted by the postal and motor strikes, but the comparison of average levels in the three months June to August and the five months January to May largely removes the effects of the distortions in the monthly figures. This comparison

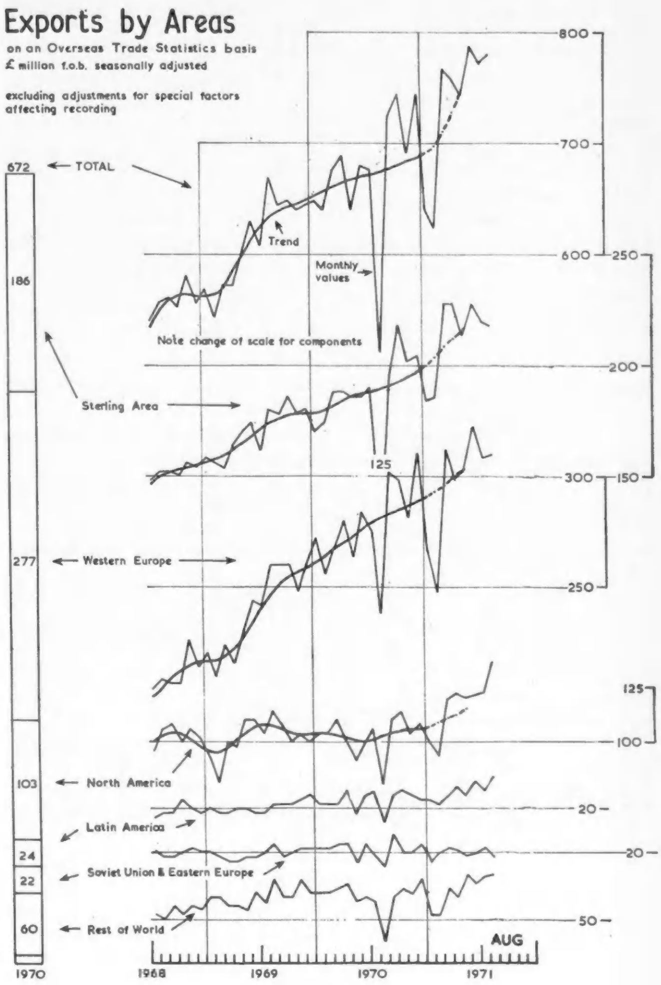
(*continued on next page*)

TABLE 3. IMPORTS

Seasonally adjusted values¶ — £ million per month

		Overseas trade statistics basis §§ (cif)	Adjustments to balance of payments basis: US military aircraft: Arrivals	Adjustments to balance of payments basis: US military aircraft: Payments	Adjustments to balance of payments basis: Freight insurance and other valuation adjustments	Adjustments to balance of payments basis: Coverage adjustments	Balance of payments basis (fob)
1969		693	−16	+ 5	−68	−14	600
1970		754	− 2	+ 1	−78	−19	657
1969	1st quarter	674	−17	+11	−68	−10	590
	2nd quarter	699	−22	+ 5	−68	−16	598
	3rd quarter	695	−16	+ 1	−68	−14	598
	4th quarter	703	− 8	+ 3	−68	−15	615
1970	1st quarter	716	− 2	+ 0	−72	−19	623
	2nd quarter	762	− 3	+ 0	−77	−16	666
	3rd quarter	741	− 1	+ 2	−79	−16	647
	4th quarter	799	− 2	+ 1	−84	−23	691
1971	1st quarter	794	− 1	+ 2	−87	−20	687
	2nd quarter	818 r	− 1	—	−85 r	−10 r	722 r
	March	847	− 2	+ 5	−89	− 9	752
	April	827 r	− 1	—	−84 r	−16 r	727 r
	May	795 r	− 1	—	−85 r	− 8 r	701 r
	June	831 r	− 1	—	−87 r	− 6 r	737 r
	July p	809 r	− 0	—	−82	− 9	718 r
	August p	802	− 1	—	−88	−12	701
	March-May	823	− 1	+ 2	−86	−11	727
	June-August p	814	− 1	—	−85	− 9	719

¶ Components and totals are rounded independently.
§§ These values are derived from the recorded values in Table 4 by the standard seasonal adjustment process.
p Provisional estimates.
r Revised estimates.



Exports by Areas

on an Overseas Trade Statistics basis
£ million f.o.b. seasonally adjusted

excluding adjustments for special factors affecting recording

TABLE 4. Recorded values
Overseas trade statistics basis

£ million per month

		Exports fob ‡	Imports cif: Total	Imports cif: Excluding US military aircraft, etc.
1969	1st quarter	555.5	687.2	670.9
	2nd quarter	618.8	706.0	684.1
	3rd quarter	611.3	676.7	661.2
	4th quarter	660.8	701.7	694.1
1970	1st quarter	649.5	715.4	713.5
	2nd quarter	688.0	785.0	781.8
	3rd quarter	608.5	719.3	718.8
	4th quarter	741.6	797.4	795.3
1971	1st quarter	673.4	811.3	809.9
	2nd quarter	794.9	829.3	828.4
	June	796.3	878.3	877.5
	July	802.1	822.7 r	822.2 r
	August p	719.5	736.9	736.0

‡ No adjustment has been made in this table for special factors affecting the recording of exports.
p Provisional estimates.
r Revised estimates.

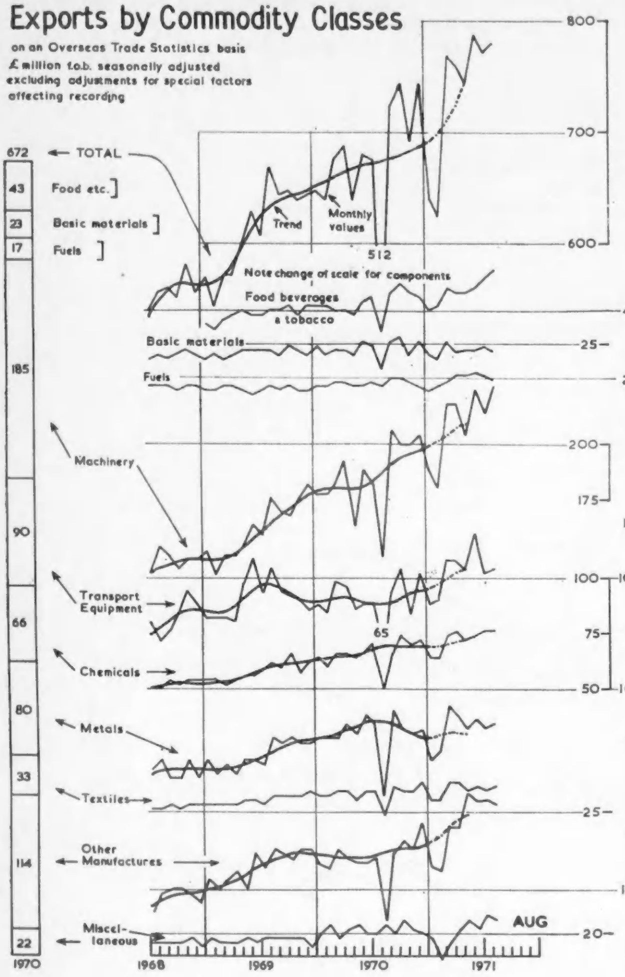
TABLE 5. EXPORTS: AREAS §
Overseas trade statistics basis §
Seasonally adjusted values

£ million fob per month

		Total	Sterling Area	Western Europe: Total	Western Europe: EEC	Western Europe: EFTA	North America	Latin America	Soviet Union and Eastern Europe	Rest of world
1970		672	186	277	147	107	103	24	22	60
	3rd quarter	638	171	272	146	103	100	22	20	53
	4th quarter	726	208	296	156	115	108	26	22	65
1971	1st quarter	678	199	276	145	108	105	23	20	56
	2nd quarter	766	224	307	163	117	122	30	20	66
	June	790	228	322	169	121	122	31	20	66
	July	774	221	308	169	110	122	28	22	69
	August p	780	217	310	162	116	137	34	18	70
	March-May	759	223	304	161	118	120	27	21	65
	June-Aug. p	781	222	313	167	116	127	31	20	69

§ See Note 1(b). No adjustment has been made in this table for special factors affecting the recording of exports.
p Provisional estimates.

UNITED KINGDOM TRADE IN AUGUST
continued



Exports by Commodity Classes

on an Overseas Trade Statistics basis
£ million f.o.b. seasonally adjusted
excluding adjustments for special factors
affecting recording

which shows a rise of 11 per cent indicates the sharpness of the recent upturn in export shipments.

Market Pattern§ Most destinations of exports have shown marked increases in recent months. The average level of exports to Western Europe (about 40 per cent of the total) was 10 per cent higher in the three months June to August than in the first five months of this year. Deliveries to the sterling area grew, on average, by 8 per cent between the same two periods, while exports to North America, which had been sluggish for a long time, showed a very strong rise of 14 per cent, with most of the increase to the United States. There were also strong increases to other destinations except the Soviet Union and Eastern Europe which showed only a slight rise.

Commodity Pattern§ The marked upward trend in machinery exports has continued in recent months; the monthly average of deliveries in June to August was 10 per cent higher than the average in the previous five months. Deliveries of road motor vehicles increased by 8 per cent between the same two periods. Increased exports of whisky to the United States largely account for the above average rate of increase in exports of food, beverages and tobacco.

Imports

General Comment The August import figure of £701 million seasonally adjusted on a balance of payments basis was somewhat below the level of the last few months. For the first eight months of 1971, imports have averaged £706 million a month, 5½ per cent higher than the average level in the second half of 1970. The average level of imports for the three months June-August was £719 million; this was 3 per cent higher than the monthly average for January-May, which included however abnormally high fuel imports and the arrival of three Boeing 747s in March.

In the first few months of the year, an increased volume of imports contributed the major part of the increase in value compared with the second half of 1970; in recent months, however, almost all the increase in the value of imports has been the result of higher import prices.

Commodity Pattern§ Comparing average monthly levels of imports for the last three months with those for January-May shows imports of the group food, beverages and tobacco to have been on average 2 per cent higher, fuel 7 per cent higher and the group semi-manufactures 3 per cent higher. Other imports were on average little changed.

Sources of Imports§ Taking the same periods for comparison, monthly imports from the sterling area were 11 per cent higher in the more recent period, while imports from North America were on

---

§ See Note 1(b).

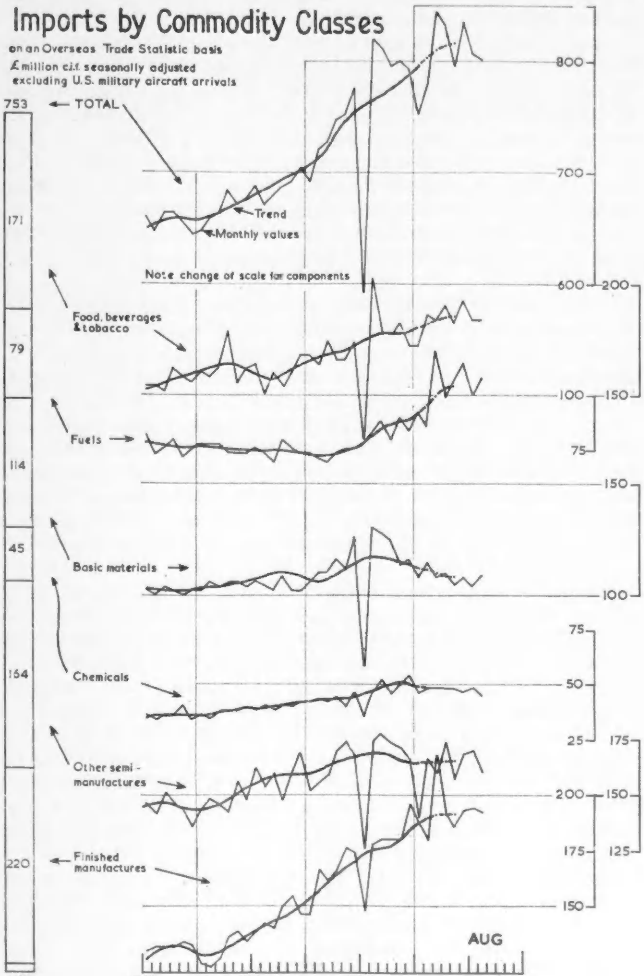
TABLE 6. EXPORTS: COMMODITY CLASSES§ Overseas trade statistics basis

Seasonally adjusted values — £ million fob per month

					Manufactures									
						Machinery and transport equipment								
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road motor vehicles	Other transport equipment	Chemicals	Metals and miscellaneous metal manufactures	Textiles	Other manufactures	Miscellaneous
1970	672	43	23	17	567	275	185	70	20	66	80	33	114	22
3rd quarter	638	41	21	18	536	262	179	65	17	62	76	31	105	21
4th quarter	726	48	25	18	608	296	201	77	21	72	82	35	123	23
1971 1st quarter	678	44	21	16	584	290	195	75	21	67	78	32	115	15
2nd quarter	766	49	22	21	652	323	215	85	25	74	85	36	137	24
June	790	50	21	22	677	343	223	92	27	74	86	37	139	22
July	774	55	24	21	646	317	215	80	22	75	81	34	140	27
August p	780	58	21	19	659	329	226	80	21	76	85	35	138	26
March-May	759	49	23	20	646	318	213	83	24	73	87	36	133	22
June-August p	781	54	22	21	661	330	221	84	24	75	84	35	139	25

§ See Note 1(b). No adjustment has been made in this table for special factors affecting the recording of exports.
p Provisional estimates.

average 9 per cent lower. Within a generally unchanged rate of imports from Western Europe as a whole in the two periods, arrivals from EEC countries were 3 per cent higher on average in the last three months, while those from EFTA countries were 3 per cent lower. There were only relatively small changes also in imports from other main areas.



Notes

1(a) **Trade Figures on a Balance of Payments Basis** The seasonally adjusted import and export figures on a balance of payments basis are obtained by making various adjustments to the seasonally adjusted figures derived from those recorded in the monthly Overseas Trade Statistics. These adjustments are summarised in Tables 2 and 3 of this article. Some are valuation adjustments; the principal of these is the deduction from the import figure of freight and insurance costs. The other adjustments relate to coverage, either to bring in items not in the Trade Statistics (for example on the import side ships built and delivered abroad direct to UK owners) or to remove items which are in the Trade Statistics (mainly returned goods and goods for processing and repair). The adjustment of imports to a balance of payments basis excludes the values of deliveries of US military aircraft (including spares and some missiles) but includes the payments for those imports which are mainly being financed by a special US Exim Bank credit. (The values involved are now small.) All these adjustments are described in greater detail in the annual 'Pink Book', *United Kingdom Balance of Payments 1971* (Table 7 and pp. 63-67) and in an article in the issue of *Trade and Industry* dated November 4, 1970.

Since firm figures for the adjustments do not become available as quickly as the recorded trade statistics, the figures for imports and exports on a balance of payments basis in the latest months are at this stage preliminary estimates and liable to revision.

1(b) The adjustments described at Note 1(a) are made only for the monthly totals of exports and imports, and cannot be estimated for the area and commodity analyses of trade. The values of total trade and the main components of exports and imports in Tables 5 to 8 are available only on the Overseas Trade Statistics basis and correspond with the totals given in the first columns of Tables 2 and 3. Whereas comment on total trade relates to total exports and imports on a balance of payments basis, analyses of the area and commodity patterns of trade in this article are based on the figures on the Overseas Trade Statistics basis in Tables 5 to 8. The main components of trade are seasonally adjusted independently from the totals and in consequence do not always add exactly to the seasonally adjusted totals.

1(c) **Visible Balance** The visible balance is the difference between the import and export figures on a balance of payments basis obtained as described in Note 1(a) above. Since, as noted above,

(continued on next page)

TABLE 7. IMPORTS: COMMODITY CLASSES Overseas trade statistics basis §

Seasonally adjusted values | £ million cif per month

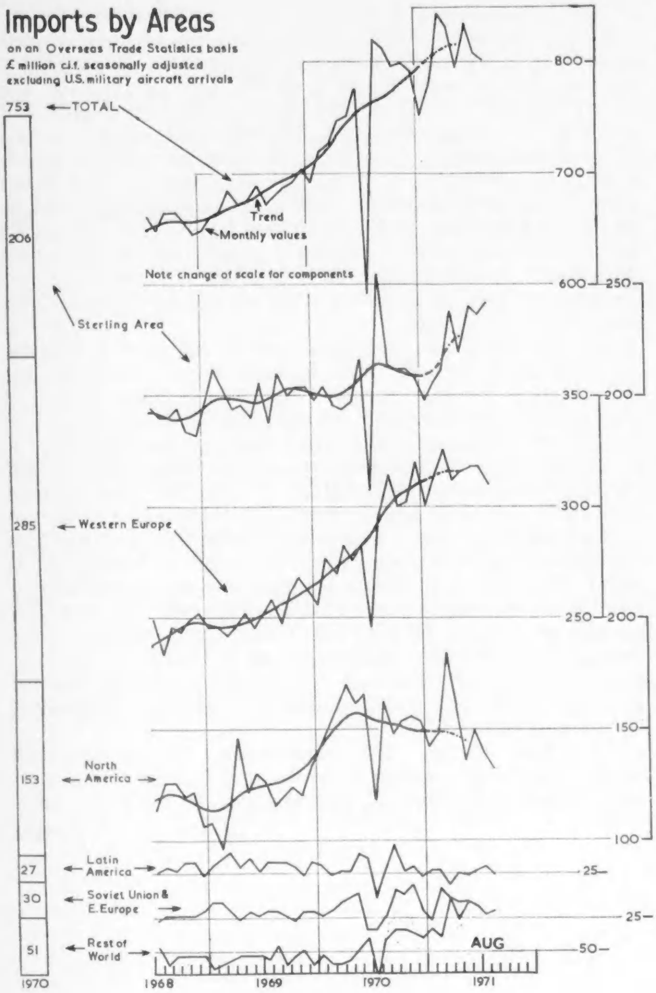
	Total	Total excluding US military aircraft, etc.	Food, beverages and tobacco	Fuels	Industrial materials				Finished manufactures		
					Total	Basic materials	Chemicals	Other semi-manufactures	Total	Excluding US military aircraft, etc.	Miscellaneous
1970	754	752	171	79	323	114	45	164	173	171	9
3rd quarter	741	740	170	83	312	108	45	159	169	169	8
4th quarter	799	797	177	85	340	119	50	171	186	185	10
1971 1st quarter	794	792	181	100	312	110	48	154	197	195	7
2nd quarter	818	817	188	106	319	107	47	165	191	190	11
June	831	830	193	114	323	108	45	169	194	193	10
July	809	809	184	101	322	105	48	169	195	195	9
August p	802	801	184	108	313	109	44	160	192	192	12
March-May	823	822	186	109	319	107	48	163	200	198	12
June-August p	814	813	187	108	319	107	46	166	194	193	10

p Provisional estimates.
§ See Note 1(b).

UNITED KINGDOM TRADE IN AUGUST
continued

the import and export figures for the most recent months are provisional, it follows that the monthly visible balances for these months are also provisional and liable to revision.

The monthly figures for the visible balance are published only on a seasonally adjusted basis. Since the balance is the difference of two large and variable figures, it is itself liable to fluctuation and undue significance should not be attached to a single month's figure; it is more useful to consider the average balance over three or more months.


Imports by Areas

on an Overseas Trade Statistics basis £ million c.i.f. seasonally adjusted excluding U.S. military aircraft arrivals

1(d) **Trends** Even after allowing for seasonal influences, the sequence of monthly figures is usually too variable to give a satisfactory indication of the underlying trend. While it is possible to construct elaborate estimates of trend these cannot be applied to the most recent months, and a simple method of giving some guidance on underlying movements in the most recent past is to take averages of three months. These averages, for the month in question and the two preceding months, are given in Table 1A. Although they are still sensitive to irregular movements in the monthly figures and to special influences, they are markedly less variable than the monthly figures. Apart from occasions when major disturbances distort the flow of trade, the three-monthly average gives a quite good short-term guide and has the merit of simplicity.

1(e) **Recording of exports** The Secretary of State for Trade and Industry announced in the House of Commons on November 16 that some under-recording of exports had re-emerged in 1970. The text of his announcement and an article on under-recording were published in *Trade and Industry*, of November 25, 1970. In reply to a Parliamentary Question on February 1, 1971, the Secretary of State said: 'There is no evidence to suggest that under-recording in recent months has differed from the estimate of 2 per cent indicated by the checks so far made of export documents received against ship and aircraft manifests: results of these checks are now available covering months up to September 1970.' Checks covering October 1970 to April 1971 do not suggest any change in the level of under-recording.

Details of new arrangements to ensure the full recording of exports were announced on August 11 when all known exporters and agents were sent by HM Customs and Excise information about the working of the new system (see article in *Trade and Industry* of August 19, 1971). The new system will be introduced on October 25.

The figures in this article for total exports (except in Tables 4, 5 and 6) and, in consequence, for the visible balance include from January 1970 an addition of 2 per cent to the value of exports as an allowance for under-recording. It is not possible to make estimates of the extent of under-recording on exports to different areas or of different commodity classes, and the figures in the Overseas Trade Statistics will not be adjusted.

For an account of special factors relating to the earlier under-recording of exports and net figures of adjustments on this account up to October 1969, see page 1392 of the *Board of Trade Journal* for May 20, 1970, on United Kingdom Trade in April.

2. Detailed particulars of United Kingdom imports and exports will be published on September 27† and further analysis of the figures will be found in Tables 124 to 143 in the Monthly Digest for October‡, due to be published in the second week of November.

† Overseas Trade Statistics of the United Kingdom, August 1971, published by HMSO, price £1.85 (Annual subscription £25.05).

‡ Monthly Digest of Statistics, published by HMSO, price 60p (Annual subscription £7.75).

TABLE 8. IMPORTS: AREAS: Overseas trade statistics basis §

Seasonally adjusted values — £ million cif per month

	Total	Total excluding US military aircraft, etc.	Sterling area	Western Europe	North America Total	North America Excluding US military aircraft etc.	Latin America	Soviet Union and Eastern Europe	Rest of world
1970	754	752	205	285	155	153	27	30	51
3rd quarter	741	740	208	285	143	143	26	28	51
4th quarter	799	797	211	307	156	154	26	35	58
1971 1st quarter	794	792	206	314	159	158	24	31	63
2nd quarter	818	817	232	315	149	148	25	29	69
June	831	830	240	318	150	149	27	29	70
July	809	809	236	318	141	141	28	26	66
August p	802	801	242	310	133	132	24	27	68
March-May	823	822	223	318	161	160	23	32	70
June-August p	814	813	239	315	141	140	26	27	68

p Provisional estimates.
§ See Note 1(b).

Monthly report on the economic situation

The following report on the economic situation, prepared by HM Treasury, will be published in 'Economic Trends' for September at the end of the month. Note: unless otherwise stated this report is based on seasonally adjusted data.

International financial developments

THE foreign exchange markets in London and several other Western European cities were closed following the announcement by the President of the United States on August 15 of the temporary suspension of dollar convertibility into gold and other reserve assets, and the temporary imposition of an additional 10 per cent tax on dutiable imports not subject to existing quantitative restrictions. On the re-opening of the London foreign exchange market on August 23, the sterling parity of $2.40 to the pound was unchanged, but it was announced that dealings would not necessarily be confined within existing limits. The official selling rate of $2.38 to the pound remained, but the official buying rate of $2.42 was withdrawn. Some Continental currencies were also permitted to fluctuate more freely than previously when the markets opened on August 23. The exchange rate of the Japanese yen was permitted to move outside established limits as from August 28.

During August the UK official reserves rose by £390 million—the addition to reserves occurred mainly in the period preceding President Nixon's announcement on August 15—to stand at £2,003 million at the end of the month. This increase was after the repayment of £256 million to the IMF and long-term debt service payments of £5 million. In the week after the market re-opened, spot sterling rose and generally stayed in the range $2.4450-$2.4720. Following the introduction on August 31 of new exchange controls on the purchase of short-dated British Government stocks and similar assets by non-residents and on the payment of interest on further inflows of foreign-owned funds deposited in Britain, the rate at the end of the month was $2.4540. On September 2, the Bank of England announced a reduction of 1 per cent in Bank Rate.

Aggregate demand and activity

Information about demand and activity in the second quarter of 1971 is still incomplete, but taking account of the available indicators it seems that gross domestic product probably recovered from the low level in the first quarter to around that reached in the second half of 1970. Consumers' expenditure—after being depressed in the first quarter, partly because of the postal strike—recovered markedly, while the volume of exports of goods and services and industrial production rose appreciably. On the other hand, the provisional figures suggest a considerable fall in investment in stocks and in industrial investment.

It is too early to assess the effects of the Budget measures and those of July 19 on demand and activity in the third quarter, but retail sales in July were over ½ per cent higher than the monthly average in the second quarter, while new car registrations at 118,000 were about one-quarter higher. Preliminary information indicates that new car registrations in August were also well above the second quarter average. The increase in National Insurance benefits, payable from September, should provide a net stimulus to consumers' expenditure in the remaining months of the year. Of the other components of demand, the improvement in the volume of exports has been sustained since the middle of the year and private housing starts in July were higher than in any month since December 1968.

Stocks and investment

The provisional estimates show that total investment in stocks fell between the first and second quarters of 1971. Although stocks in the retail and wholesale sectors showed a rise of about £52 million (at 1963 prices), manufacturers' stocks fell by about £116 million (at 1963 prices). As for fixed investment, it was expected at the time of the measures of July 19 that industrial investment in the second quarter would be below that in the first. This has been confirmed by the provisional estimates which show a fall of about 4 per cent in manufacturing investment between the first and second quarters. There was little change, however, in capital expenditure by the distributive and service industries between the same periods.

Housing

In response to a strong demand for housing, as evidenced by the higher level of commitments for advances on new housing by building societies, private sector housing starts rose sharply in July. Completions also showed a further increase in July, and were higher than in any month since June 1969. In the public sector, starts and completions recovered from the abnormally low levels in June to be slightly above the monthly averages in the second quarter.

External position

In the first half of 1971, the balance of payments on current account is provisionally estimated to have been in surplus by £316 million, a little above the half-yearly rate in 1970. Visible trade continued to be near to balance; net invisible earnings increased somewhat. The quarterly figures have fluctuated sharply, partly because of the incidence of strikes and their aftermath. The major part of the sharp change in the current account surplus between the first two quarters of this year—from £79 million in the first quarter to £237 million in the second quarter—is the consequence of strike distortions. After making allowance for this there seems to have been a flattening in the growth of import volume during the year so far, associated with the low level of demand in the economy generally and low stockbuilding. The volume of imports of manufactures in the three months ending July was only about 2 per cent above the average level of the second half of last year, much below the past average rate of increase. As demand picks up, and a more normal rate of investment in stocks develops, there is likely to be a faster increase in imports.

There was a total currency inflow (not seasonally adjusted) in the first half-year much in excess of the current account surplus. But in normal times a substantial surplus on current account is required to cover net investment and other capital outflows.

The surplus on visible trade in August of £68 million reflects the recent growth in exports at a time when the level of imports has been restrained. The value of exports in August continued at about the high average level of the two preceding months. For the first eight months of the year, the monthly average was some 8 per cent higher than in the second half of last year; nearly one-half of this increase was attributable to a rise in the volume of exports. Comparing monthly rates for the same period, the rise in the value of imports was 5½ per cent; about one-third of this increase reflected higher import volumes.

Industrial activity

Industrial production in the first half of 1971 was about 1½ per cent higher than a year earlier. Within the total, output of the consumer goods industries responded to the rise in consumer spending over the year to the first half of 1971 and most registered above-average rates of increase, although in some of these industries output had been somewhat depressed in early 1970. Deliveries by the electrical engineering industry to both home and export markets rose sharply during the year, and there was a rise in output in the coal industry. Falls in output took place in the paper and printing industries, where foreign competition was strong, and in metal manufacture, where low demand was accompanied in the case of iron and steel by a run-down of stocks in the first half of 1971. The modest rise of 1½ per cent in total industrial production between the first halves of 1970 and 1971 was associated with an estimated drop in employment in these industries of over 3 per cent (subject to revision when the mid-1971 employment estimates become available). This indicates that output per man, which had risen relatively slowly between the first halves of 1969 and 1970, increased appreciably.

The substantial increase of consumer spending between the first and second halves of 1970 and the subsequent slow-down in the first half of this year are reflected in the pattern of output growth in most of the consumer goods industries. Output growth between the first halves of 1970 and 1971 in food, pottery and glass, timber and furniture, and textiles, was concentrated in the earlier period. Among consumer durables, production of colour television sets has continued on a strong upward trend, but the volume of sales of other domestic electrical appliances was sluggish in the first half of

THE ECONOMIC SITUATION
continued

1971. Partly owing to the effects of strikes, the production of passenger cars in the first half of this year was only about the same as that in the first half of last year.

Output in the energy industries rose faster than consumption between the first halves of 1970 and 1971, especially in coal where there was rebuilding of coal stocks in the first half of this year. There was an easing in energy demand in the first half of 1971, attributable mainly to the low level of activity. During 1970 coal production was hampered by a disappointing productivity performance, declining manpower and the November strikes, and stocks fell heavily towards the end of last year. More recently, however, labour recruitment has improved and production in the first half of this year was 1½ per cent higher than in the corresponding period of last year. Together with the lifting of the ban on coal imports, this has permitted some rebuilding of stocks this year. In 1970, the increase in UK oil refinery output exceeded the growth in demand and net imports of oil products amounted to less than 4 million tons, well below the level of previous years. Within the total demand for energy, the share of gas has been rising and the growth in gas production between the first halves of 1970 and 1971 was over 20 per cent.

Output of steel was particularly low in the first half of 1971. Stocks held by consumers and merchants had risen by over 1 million tons (or from 11½ to 15 weeks' consumption) during 1969 and 1970, but in the first half of this year there was a marked run-down of these stocks and of stocks held by producers.

The labour market

Between the July and August counts, the seasonally adjusted total of wholly unemployed (excluding school-leavers) rose by about 11,000 to 799,000. Over the same period, however, adult vacancies showed a small increase of 1,500.

Prices and wages

The index of retail prices (not seasonally adjusted) rose more slowly in July than in each of the preceding four months. There was a sharp fall in the price of seasonal food, but this was more than offset by higher prices for other items, particularly fuel and light and non-seasonal food, and the index rose by about ¼ per cent. As the index relates to July 20, it only partly reflects the cuts in the rates of purchase tax announced by the Chancellor of the Exchequer on July 19.

The response of companies to the CBI proposal on price restraint has been encouraging; by September 8, 176 of the 201 major companies had signed the undertaking to do their utmost not to raise prices, or to limit unavoidable price increases to 5 per cent per annum, while decisions had still to be taken by a further seven. Those companies which felt unable to sign the undertaking had, nevertheless, expressed support for the proposal. In addition, over 600 smaller companies had volunteered undertakings, and the CBI had secured expressions of support from a large number of trade associations in many different industries and from leading companies in retail distribution and other service sectors.

The index of average earnings in the first six months of 1971 rose at a considerably slower rate than in the two preceding six-month periods. Between December 1970 and June this year, the index rose by about 3¾ per cent as compared with rises of 6½ per cent between June and December 1971 and between December 1969 and June 1970. The deceleration in earnings in 1971 partly reflects a fall in hours worked associated with the low pressure of demand.

Financial trends

Domestic credit, which did not change in the first quarter of 1971, expanded by about £160 million in the second quarter. The rise was mainly due to increased borrowing by local authorities and bank lending in sterling to the private sector and overseas. But for the delay caused by the postal strike in collecting tax receipts, the rise would have been considerably greater. Other factors which restricted the expansion of domestic credit were large sales of gilt-edged stocks to the non-bank public and of national savings following the increased limits on individual holdings announced in the Budget.

As the result of domestic credit expansion and a continued inflow of funds from abroad, the money supply (M3) increased by around £400 million in the second quarter (about 2¼ per cent), some £60 million less than in the first quarter. The quarterly comparison, however, is distorted by the postal strike; after making allowance for this, the rise in the second quarter may have been near 3 per cent, compared with about 2 per cent in the preceding quarter.

London clearing bank advances (other than to nationalised industries) were virtually unchaged in August, but there was a moderate rise in restricted lending due to an increase in commercial bill holdings. Lending to persons, builders and property companies remains buoyant, but there is still little evidence of a rise in advances to industrial and commercial companies, although the banks continue to report increased inquiries for working capital facilities. Restricted lending remained well within the guideline of 110 per cent of the March 1970 base which had been set for the current quarter.

Business Monitor

THE following titles and issues of Business Monitor are now available and copies may be obtained by annual subscription from HMSO, PO Box 569, London, SE1 9NH.

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- Foam Backing, Foam Laminating and Fabric to Fabric Bonding for July.

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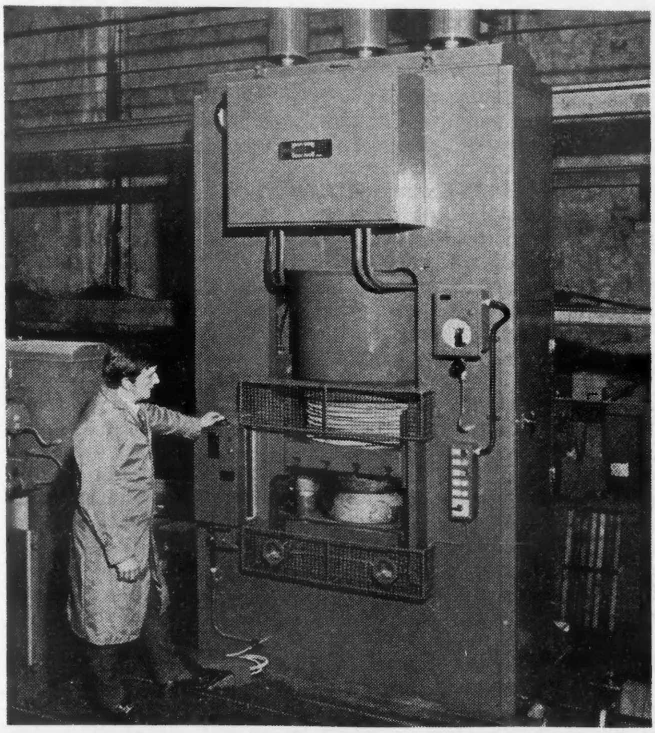
- Metal-working Machine Tools for First Quarter.

Service and distributive series

Monthly at £1 each a year post free:
- Instalment Credit Business of Finance Houses for July.
- Instalment Credit Business of Retailers for July.

A complete list of titles of Business Monitors was last published in *Trade and Industry* on August 26 on page 403.



Exporting to Sweden for the first time, the Hydraulic Engineering Co. has just supplied Volvo with the latest version of its well-established hydraulic coining press. In addition to this 750-ton press, the Company's recent export efforts have resulted in sales of similar presses in France and the Netherlands. Orders have also been received for another machine for Sweden, and for other types for customers in Singapore and Romania.

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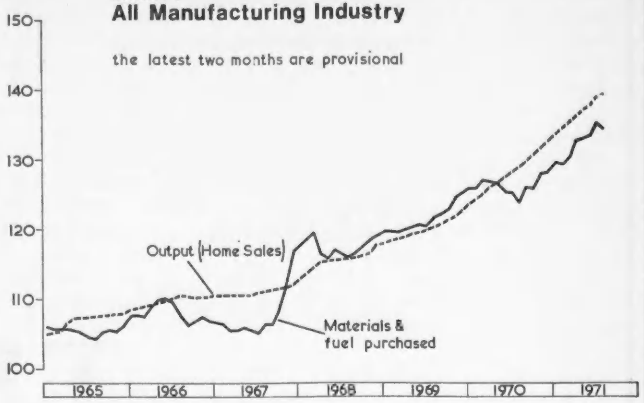
WHOLESALE PRICE INDEX NUMBERS

Smaller increase in output prices in August

THE provisional price index for home sales of manufactured products rose ½ per cent in August. This was around half the average monthly increase in the past year, and the lowest since 1969. The provisional index was 8 per cent higher than in August last year.

The provisional price index for basic materials and fuel used in manufacturing industry fell ½ per cent in August after rising fairly steadily since February. This reduction mainly reflected a drop in food materials prices, which was probably seasonal.

CHART I
All Manufacturing Industry



Materials and fuel purchased by broad sectors of industry (Table 1)

Changes in the provisional index numbers were for the most part slight in August, amounting to less than ½ per cent in most sectors of manufacturing. The index for the food manufacturing industries however, fell 1½ per cent, probably reflecting seasonal factors, and there were reductions of ½ per cent in the index numbers for the steel and electrical engineering industries. The index for the textile industries rose ½ per cent owing to an increase in prices of raw cotton.

The comparatively fast recent rate of increase in prices of construction materials continued in August with a further rise of ½ per cent.

Notes on Wholesale Price Index Numbers

(1) Detailed notes on index numbers of wholesale prices are published in the annual article. They were last shown in *Trade and Industry* of February 24, 1971.

(2) The index numbers are constructed on a net sector basis. That is to say, the price movements used to compile the index for a particular sector of industry are only those relating to transactions between the sector and other sectors. Transactions between undertakings in the same sector are excluded. Thus index numbers for the whole of manufacturing industry are not weighted averages of sector index numbers.

(3) Correspondence about wholesale price index numbers should be addressed to Statistics Division, DTI, Room 610, Sanctuary Buildings, Great Smith Street, London, S.W.1. Telephone inquiries for price index numbers should be made to 01-222 7877, Ext. 3549 (Engineering), 3548 (Non-Engineering) and 3411 for all other information.

Output of broad sectors of industry: home sales (Table 2)

Index numbers for most sectors of manufacturing continued to go up in August, but increases tended to be smaller than in July. A slight increase in the index for food manufacturing was in contrast to rises averaging nearly 1 per cent a month between March and July. Increases of ½ per cent in the index numbers for the engineering industries, textiles and chemicals were also less than their monthly average increase in the first half of the year. In clothing and footwear, the timber and paper industries, increases in August were close to their average in the first half year.

TABLE 1. PRICE INDEX NUMBERS OF MATERIALS PURCHASED 1963=100

1968 SIC		1970			1971		1970	1971							
		2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	Aug.	Jan.	Feb.	Mar.	Apr.	May	June	July p	Aug. p
	Materials and fuel purchased by manufacturing industry														
Orders III to XIX	Basic materials and fuel purchased by manufacturing industry:	126.1	124.9	127.3	129.7	133.1	123.9	129.6	129.2	130.4	132.9	133.0	133.5	135.3	134.6
	Basic materials	126.5	124.9	126.8	129.0	131.5	123.7	129.1	128.4	129.5	131.3	131.2	131.9	134.0	133.1
	†Fuel	124.0	124.8	129.9	133.8	143.0	124.7	132.5	133.5	135.3	142.3	143.4	143.4	143.4	143.4
Orders IV to XIX	Basic materials and fuel purchased by manufacturing industry, other than food, drink, and tobacco manufacturing industries	129.2	127.0	127.8	131.2	137.3	126.1	129.8	130.6	133.2	137.2	137.3	137.4	138.9	139.1
	Basic materials other than fuel	130.4	127.5	127.3	130.7	136.0	126.4	129.2	130.0	132.7	136.1	135.9	136.0	137.8	138.1
	Materials and fuel purchased by Selected Broad Sectors of Industry														
211-229	Food manufacturing industries	120.8	121.6	126.5	127.4	126.0	120.5	129.6	126.9	125.6	125.3	125.4	127.1	129.5	127.8
Order V	Chemicals and allied industries	122.4	123.7	127.8	131.3	133.8	123.4	130.3	131.3	132.3	133.1	133.4	134.8	136.0	135.9
311 and 312	Steel industries	125.2	127.8	131.7	135.4	140.8	126.4	134.4	135.3	136.3	139.7	141.3	141.4	141.1	140.7
Order VII (excluding MLH 342)	Mechanical engineering industries	138.8	137.2	138.9	140.5	147.2	136.9	139.8	140.0	141.5	146.2	147.6	147.9	148.1	148.0
Order IX	Electrical engineering industries	159.1	150.7	146.0	146.9	153.6	149.9	144.8	146.0	150.1	155.8	153.3	151.8	152.7	152.2
361	Electrical machinery industry	150.6	147.0	146.2	147.4	153.8	146.7	146.3	146.6	149.1	153.9	153.9	153.6	154.1	153.8
Order XIII	Textile industries	104.2	104.3	103.8	105.6	108.6	104.4	105.1	105.4	106.3	107.4	108.8	109.7	110.0	110.5
Order XV	Clothing and footwear industries	119.9	121.6	122.6	124.0	126.4	121.6	123.7	124.0	124.5	125.4	126.4	127.5	128.0	128.1
Order XVII	Timber industries	134.0	135.6	137.4	139.9	142.8	135.6	139.0	139.9	140.7	142.1	143.0	143.3	143.7	143.9
481 to 484	Paper industries	131.5	135.5	137.3	139.7	141.6	135.6	139.3	139.8	140.1	141.3	141.8	141.7	142.0	142.1
Order XX	Construction materials	128.2	130.4	133.1	136.0	141.5	130.5	134.5	136.1	137.5	139.3	142.1	143.0	143.7	144.4
Part of Order XX	House building materials	130.2	132.9	135.5	138.4	143.0	133.1	137.0	138.5	139.8	141.5	143.5	144.1	145.0	146.0

† Coal (except for carbonising), gas and electricity. Crude oil and coal for carbonising are included in basic materials.

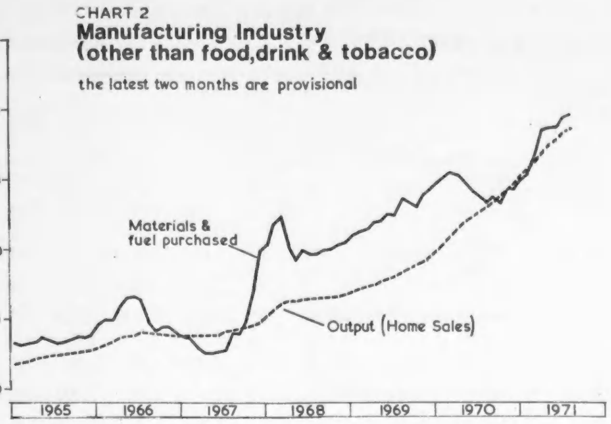


CHART 2

Manufacturing Industry (other than food,drink & tobacco)

the latest two months are provisional

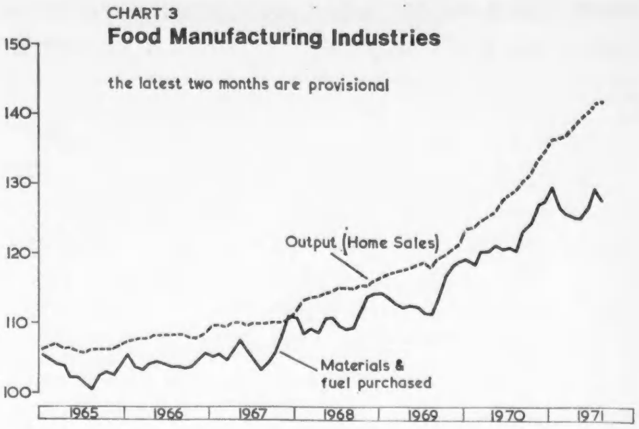


CHART 3

Food Manufacturing Industries

the latest two months are provisional

TABLE 2. PRICE INDEX NUMBERS OF OUTPUT

1963=100

1968 SIC		1970			1971		1970	1971							
		2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	Aug.	Jan.	Feb.	Mar.	Apr.	May	June	July p	Aug. p
Orders III to XIX	Output of Manufactured Products														
	Total sales	127.6	129.7	132.8	135.8	138.7	129.6	135.1	135.7	136.5	137.7	138.8	139.5	140.2	140.5
	Home sales	126.6	128.7	131.4	134.4	137.2	128.6	133.8	134.5	135.1	136.3	137.3	138.0	138.9	139.3
Orders IV to XIX	Products of manufacturing industries other than food, drink and tobacco manufacturing industries:														
	Total sales	125.8	128.0	131.2	134.4	137.7	128.0	133.5	134.3	135.3	136.7	137.8	138.7	139.3	139.6
	Home sales	123.6	125.7	128.4	131.7	135.0	125.7	130.8	131.7	132.6	134.0	135.0	135.9	136.7	137.2
	Output of Selected Broad Sectors of industry														
211 to 229	Products of the food manufacturing industries: Home sales	126.3	129.4	133.2	136.8	139.4	129.1	136.5	136.7	137.0	138.1	139.7	140.4	141.7	141.9
Order V	Chemicals and allied industries: Total sales	114.2	116.4	118.3	121.4	122.5	116.6	120.5	121.9	121.9	122.2	122.1	123.2	123.8	124.1
	Home sales	110.3	112.3	113.7	117.4	119.7	112.3	116.0	118.0	118.4	119.4	119.6	120.2	120.9	121.3
311 and 312	Steel industries: Total sales	129.8	130.2	134.4	134.8	141.5	130.1	134.6	134.7	135.0	139.9	142.6	142.1	142.1	142.1
	Home sales	130.0	129.6	133.8	134.7	142.7	129.5	134.7	134.7	134.8	140.5	143.7	143.8	143.9	143.8
Orders VII to XII	Engineering and allied industries: Total sales	128.1	130.1	134.2	137.5	141.2	130.4	136.6	137.4	138.6	140.0	141.1	142.6	143.1	143.3
	Home sales	127.2	129.3	132.0	134.9	138.4	129.2	134.1	134.8	135.8	137.4	138.4	139.5	140.2	140.5
Order VII (excluding MLH 342)	Mechanical engineering: Home sales	130.3	133.5	136.8	139.9	143.3	133.5	139.0	139.9	110.8	141.9	143.3	144.6	145.6	146.2
Order XI	Electrical engineering: Home sales	126.0	127.7	130.2	133.3	134.7	127.5	133.2	133.2	133.4	134.6	134.4	135.0	135.6	135.5
Order XIII	Textile industries: Total sales	116.4	117.9	118.8	120.3	122.3	118.0	120.0	120.1	120.8	121.6	122.7	122.6	123.2	123.5
	Home sales	115.3	117.1	117.8	119.1	120.8	117.1	118.6	119.1	119.6	120.1	120.8	121.6	122.3	122.6
Order XV	Clothing and footwear: Home sales	114.6	115.7	118.8	120.6	121.6	115.6	120.1	120.7	121.0	121.2	121.7	121.8	122.3	122.6
Order XVII	Timber industries: Home sales	129.7	132.0	134.5	140.2	142.0	132.0	138.0	140.7	141.1	141.6	142.1	142.4	143.3	144.0
481 to 484	Paper industries: Home sales	128.2	132.6	135.4	137.8	139.2	133.0	137.1	137.7	138.8	139.2	139.2	139.4	139.9	140.5
Order XX	New construction‡	131	133	135	138					138					

‡ Index of building costs relate to average for the quarter.

(*continued on next page*)

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WHOLESALE PRICE INDEX NUMBERS *continued*

TABLE 3(a) COMMODITIES PRODUCED IN THE UNITED KINGDOM

1963 = 100

1968 SIC		1970	1971			
		Aug.	Feb.	June.	July p	Aug. p
101	Coal	124.8	145.7	152.2	155.6	155.7
102/2	Slates	120.6	150.5	150.5	150.5	150.5
109/3	Salt	98.6	104.6	107.8	114.2	114.2
211	Flour	122.5	130.1	130.1	130.1	130.1
216	Sugar refined	94.9	100.2	107.2	108.5	109.6
217	Chocolate and sugar confectionery	137.4	139.6	146.4	147.5	148.8
231	Beer	145.8	153.2	153.5	154.3	154.3
240	Tobacco and cigarettes	138.8	139.9	139.9	139.9	139.9
262	Motor spirit, Two Star (including duty)	147.5	153.2	155.0	155.0	155.0
262	Medium fuel oil (950 secs.)	115.1	135.0	141.1	141.1	141.1
263	Lubricating oil and grease	114.4	123.6	132.4	132.4	132.4
271	General chemicals	108.5	113.4	114.9	115.7	115.8
272	Pharmaceutical chemicals	107.4	110.4	115.4	115.4	115.3
272	Pharmaceutical preparations	97.4	98.4	101.5	102.5	102.7
273	Toilet preparations	132.8	136.7	141.0	143.4	144.6
274	Paint	111.2	123.6	125.8	125.8	125.8
275	Soap	133.3	139.0	140.1	141.2	142.4
275	Soapless detergents	112.5	113.4	117.2	117.5	117.7
276/1	Synthetic resins and plastics materials	100.4	102.6R	103.8	103.9	104.0
279/7	Photographic paper and films and photochemical materials	123.8	126.4	128.1	128.8	131.6
311/2	Steel sheets	121.9	128.1	135.4	135.4	135.4
311/2	Tinplate	126.5	134.2	143.2	143.2	143.2
311/2	Other finished steels	130.1	134.6	144.0	144.0	144.0
312	Steel tubes	139.8	146.8	158.4	158.4	158.4
313/3 and 313/4	Iron castings	130.2	136.2	146.8	147.3	147.7
321	Aluminium and aluminium alloy products:					
	Rolled	143.2	148.9	148.9	148.9	148.9
	Extruded and drawn	142.1	152.0	152.0	152.0	152.0
	Castings	154.2	153.0	160.8	160.8	160.8
	Forgings	133.4	140.0	140.0	140.0	140.0
322	Brass ingot 63-35 B.S. 1400 B.3 delivered	244.8	201.3	200.9	202.0	199.9
331	Agricultural machinery	128.2	133.3	137.7	137.8	137.9
353/1	Dental goods	140.1	142.9	142.0	144.5	144.5
365/1	Gramophone records, etc.	106.5	111.6	111.7	111.7	112.0
368	Domestic electrical appliances	111.7	116.7	118.8	118.9	118.9
391	Tools and implements	139.2	146.3	151.0	151.2	151.2
392	Cutlery, spoons and forks	132.5	139.9	142.5	142.6	143.0
	Cutlery (other than razors and razor blades)	136.2	147.2	148.5	148.7	148.9
	Spoons and forks	157.3	169.0	169.2	169.6	170.3
399/6	Domestic hollow-ware	160.2	177.5	181.1	181.1	181.1
399/7	Vats, tanks, cisterns and other industrial hollow-ware	132.2	136.1	147.7	147.7	147.7
411	Man-made fibres	90.9	92.8	93.0	92.6	92.6
412, 414/5 and 415	Man-made fibres yarns	110.9	114.2	117.7	117.7	117.7
412/1	Cotton and cotton mixture yarns	144.4	147.7	156.1	156.4	..
413/1	Cotton cloth	146.6	148.5	151.9	154.8	..
413/5	Man-made fibres fabrics	115.1	116.8	120.6	120.9	120.9
413/6	Linen	140.9	142.8	143.5	145.2	145.4
414/1	Wool tops	80.2	72.6	75.3	75.1	74.6
414/2	Worsted yarns	101.7	97.3	102.5	102.3	102.0
415/1	Jute yarn	157.9	158.2	170.5	175.4	175.4
415/2	Jute piece-goods	147.0	147.0	154.2	161.5	161.5
416	Rope, twine and net	105.7	111.0	113.1	113.3	113.4
417	Hosiery and other knitted goods	99.4	100.9	100.8	100.9	101.2
419	Carpets and rugs	121.0	122.5	126.0	126.1	126.1
422/2	Canvas goods and sacks	116.7	117.4	122.3	123.0	123.6
431/1	Leather for footwear	135.7	134.0	138.5	138.2	..
432/1	Travel goods	126.7	134.7	134.7	134.5	134.9
441-449	Made-up clothing	115.1	120.7	121.3	121.7	121.9
441	Weatherproof outerwear	108.9	111.9	112.2	112.0	112.2
442	Men's and boy's tailored outerwear	112.3	124.2	124.6	124.9	125.0
443	Women's and girls' tailored outerwear	118.5	120.8	122.6	122.8	122.8
445/1	Women's and girls' light outerwear	117.5	118.8	118.9	119.1	119.1
450	Footwear	116.5	120.2	122.6	122.7	122.8
461/1	Refractory goods, including bricks	127.5	136.1	139.7	139.7	140.6
461/2	Non-refractory goods. including bricks	126.4	132.8	135.9	136.8	138.8
	Building bricks, fletton common, *delivered*	145.8	145.8	145.8	147.7	156.4
	Building bricks, common other than fletton, *ex-works*	135.2	143.1	149.0	149.0	149.8
462/3	Domestic china and earthenware	145.3	151.4	160.9	163.3	163.5
463/1	Glass (other than containers)	125.3	127.0	134.8	137.4	137.3
463/2	Glass containers	119.3	132.2	139.4	141.6	142.5
464	Cement, delivered	126.9	137.8	163.3	163.3	163.3
469/1	Abrasive paper and cloth	128.8	128.8	134.4	134.4	134.4
469/2	Cast stone and cast concrete products	115.6	125.5R	128.3	131.3	131.4
471/1	Home-grown hardwood, sawn	121.5	128.0	130.3	130.4	130.4
471/2	Building joinery	141.5	152.6	154.2	156.9	156.9
472	Domestic furniture	128.7	136.0	138.1	138.1	138.6
473	Bedding, etc.	131.8	144.4	144.5	146.8	148.2
481	Paper and board	130.9	135.5	136.0	136.1	136.2
482/1	Cardboard boxes, cartons and fibreboard packing cases	140.8	144.8	146.8	148.8	149.6
482/2	Packaging products of paper etc.	127.4	132.4	133.8	133.8	133.8
	Paper bags	127.4	130.8	133.1	133.1	133.1
483	Manufactured stationery	136.6	141.9	147.3	147.2	147.7
484/1	Wallpaper	144.0	149.1	157.9	157.9	157.9
491/1	Rubber tyres and tubes	122.4	132.4	133.6	134.3	134.3
491/2	Rubber goods (other than tyres and tubes)	128.4	135.9	139.8	140.2	140.2
492	Linoleum and felt base	139.9	148.5	150.8	153.0	153.0
493	Brushes and brooms	126.7	130.5	132.2	132.3	132.3
494/1	Toys and games	128.2	137.8	140.4	141.1	..
494/2	Perambulators, etc.	125.1	132.1	139.9	141.5	142.1
494/3	Sports equipment	117.1	121.9	122.3	122.3	..
495/1	Pens and pensils	118.3	125.7	128.5	128.5	129.0
495/2	Other stationers goods	122.5	130.0	130.2	130.2	130.2
496/2	Plastics products (other than components and accessories)	99.2	103.2	104.0	104.1	104.1

TABLE 3(b). COMMODITIES WHOLLY OR PARTLY IMPORTED INTO THE UNITED KINGDOM 1963=100

	1970	1971			
	Aug.	Feb.	June	July	Aug.
Hides and skins	129.3	122.6	143.2	139.9	139.5p
Imported	129.3	132.8	147.8	146.4p	145.0p
Native	129.3	108.7	136.9	131.0	132.1
Non-ferrous metals:					
Aluminium, virgin ingot delivered	144.4	144.4	144.4	144.4	144.4
Copper, ex-ship wharf or warehouse†	228.7	183.7	194.1	200.5	195.7
Lead, ex-ship, wharf or warehouse†	190.4	177.1	176.9	174.5	170.2
Nickel,refined, delivered	187.0	194.2	194.2	194.2	194.2
Tin ingot, min. 99.75%†	168.4	161.2	160.4	160.7	158.5
Zinc, ex-ship, wharf or warehouse†	164.8	149.8	169.9	175.0	175.2
Oils, resins and gums:					
Palm oil, c.i.f., in bulk	121.1	135.1	120.4	120.4	132.5
Whale oil, crube	176.8	178.1	125.9	125.9	125.9
Natural rubber	82.5	76.9	76.3	71.5 p	69.7 p
Sulphur, crude c.i.f. (for acid making)	124.9	124.9	117.1	112.7	112.7
Textiles:					
Cotton, raw	108.1	114.6	121.0	122.0	126.5
Jute, raw, PWC grades, c.i.f. Dundee	161.4	158.3	168.6	166.9	165.5
Jute, raw, PWB grade c.i.f. Dundee	147.6	146.3	155.6	154.3	152.6
Silk, raw, delivered mill	167.5	161.8	153.8	149.8	149.3 p
Sisal, East Africa, No. 1 grade, c.i.f. London	45.8	50.9	54.0	..	..
Wool, raw	73.7	67.0	71.6	71.4	71.2 p
Crossbred, medium and course, c.i.f. UK	65.9	61.9	70.3	70.3	70.3
Crossbred, fine, c.i.f. UK	73.7	68.1	72.8	72.8	72.1
Merino, c.i.f. UK	78.5	69.8	73.9	73.9	73.9
Timber:					
Imported hardwood (ex-yard or wharf)	139.9	143.3	146.1	146.4 p	146.6 p
Imported plywood (delivered to consumers)	142.6	145.6	146.5	..	..
Imported softwood (delivered to consumers)	139.9	143.1	145.0	..	..
Woodpulp, imported	147.1	150.0	150.2	150.4 p	150.4 p

† LME settlement price
§ Producers' price

Index Numbers of Wholesale Prices

The index numbers of wholesale prices relating to 1963 = 100 supersede those previously published on the base 1954 = 100. For the convenience of those who use the index numbers in long-term contracts to take account of changes in the costs of materials, the DTI will continue to publish indices relating to materials purchased by broad sectors of industry on the base 1954 = 100 until December 1971. From January 1969 the index numbers in the accompanying table have been given the month to month movements of the equivalent index in the 1963 = 100 Series. For users of other 1954 based index numbers who wish to continue the series in this way, conversion factors will be provided on request.

Price Index Numbers of Materials purchased 1954=100

1958 SIC		1971		
		June	July p	Aug. p
	Materials and fuel purchased by manufacturing industry			
Orders III to XVI	Basic materials and fuel purchased by manufacturing industry	136.7	138.5	137.8
	Basic materials	129.9	131.9	131.1
	Fuel	190.3	190.3	190.3
Orders IV to XVI	Basic materials and fuel purchased by manufacturing industry other than food, drink and tobacco manufacturing industries	141.0	142.5	142.7
	Basic materials other than fuel	132.4	134.2	134.5
	Materials and fuel purchased by selected broad sectors of industry			
211 to 229	Food manufacturing industries	129.3	131.8	130.0
263 to 277	Chemicals and allied industries	144.9	146.1	146.0
331 to 349 (excluding 342)	Mechanical engineering industries	195.3	195.7	195.6
361	Electrical machinery industry	185.1	185.7	185.4
Order X	Textile industries	106.7	107.0	107.5
Order XIV	Timber industry	158.7	159.2	159.4
481 to 483	Paper industries	149.7	150.0	150.1
Order XVII	Construction materials	175.1	176.0	176.8
Part of Order XVII	House building materials	176.8	177.9	179.1

New companies registered

BELOW are details of new companies registered in Great Britain during August 1971 showing nominal capital. The figures are exclusive of unlimited companies and companies limited by guarantee.

Nominal capital	Total	Public companies	Private companies
Not exceeding £100	2,341	..	2,341
Over £100 but under £1,000	122	..	122
£1,000 but under £10,000	877	..	877
£10,000 but under £50,000	122	..	122
£50,000 but under £100,000	14	..	14
£100,000 but under £1,000,000	6	..	6
£1,000,000 and over	1	..	1
Total number	3,483	..	3,483
	£ thous.	£ thous.	£ thous.
Total amount of nominal capital	6,559	..	6,559

Companies registered in Great Britain in 1970 and 1971

	1970		1971	
	Number	Nominal capital £ thous.	Number	Nominal capital £ thous.
January	2,087	5,528	2,684	10,440
February	2,156	7,556	2,323	3,961
March	2,464	5,098	3,136	7,720
April	2,556	7,657	3,210	16,525
May	2,322	10,323	3,087	5,233
June	2,670	6,097	3,569	7,317
July	2,573	16,272	3,142	6,631
August	2,280	4,355	3,483	6,559
September	2,461	6,404		
October	2,615	6,726		
November	2,564	4,831		
December	2,972	37,229		
Total	29,720	118,076		

General index of retail prices

THE Department of Employment announce that at August 17 the official index figure which measures changes in the average level of retail prices compared with the level at January 16, 1962 (taken as 100), was 155.3 compared with 155.2 at July 20.

Index of industrial production for July

THE provisional estimate index of production for July 1971, prepared by the Central Statistical Office, is 125.6 (seasonally adjusted). For manufacturing industry alone the figure is 128.7.

For the three months May to July 1971, it is provisionally estimated that production as a whole was 1.3 per cent higher than in the preceding three months, February to April 1971; for manufacturing industries alone there was an increase of 1.5 per cent.

The average index numbers of the latest three months and the previous three months shown at the foot of the table give a general guide to the changes which have taken place in the output of the major groups in recent months.

INDEX OF INDUSTRIAL PRODUCTION

Seasonally adjusted

1963 = 100

	Total all industries	Mining and quarrying	Manufacturing industries												
			Total	Food, drink and tobacco					Engineering and allied industries						
				Total	Food	Drink and tobacco	Coal and petroleum products	Chemicals and allied industries	Total	Mechanical engineering	Instrument engineering	Electrical engineering	Shipbuilding and marine engineering	Vehicles and aircraft	Metal goods, n.e.s.
Weights	1,000	56	749	84	55	29	7	64	313	90	10	68	15	81	49
1966	113.2	90.1	114.2	108.7	106.8	112.3	121.8	123.4	116.0	122.6	121.9	120.6	93.2	111.7	110.3
1967	113.9	89.1	114.2	110.8	108.6	115.0	116.3	130.4	115.6	123.1	123.1	129.1	90.0	106.3	105.0
1968	119.8	84.8	121.4	115.5	112.3	121.6	126.4	140.0	122.4	125.5	134.7	137.4	86.8	117.2	113.4
1969	122.9	80.3	125.6	118.9	115.8	124.8	139.3	149.2	127.2	131.3	146.6	144.0	85.4	118.6	119.4
1970	124.1	78.3	127.1	121.5	117.0	130.2	151.1	158.0	128.1	134.9	152.3	148.6	86.1	115.9	115.4
1969 2nd quarter	123.3	81.2	125.7	118.2	115.0	124.2	136.8	147.7	127.0	130.7	152.5	140.4	85.3	121.0	119.0
3rd quarter	123.2	81.2	126.3	118.7	114.5	126.9	138.7	151.8	129.2	132.8	147.9	148.5	84.8	121.6	118.2
4th quarter	123.5	76.9	126.7	122.1	119.2	127.8	142.8	152.7	128.1	133.8	143.1	145.2	86.0	118.3	119.8
1970 1st quarter	123.8	80.2	126.6	118.2	114.4	125.9	150.0	151.3	128.3	134.5	154.1	147.2	85.6	119.2	113.4
2nd quarter	123.5	79.3	126.1	121.3	115.4	132.9	145.3	158.3	127.3	134.8	157.0	147.7	84.7	114.1	114.5
3rd quarter	124.3	78.8	127.3	122.8	118.7	130.8	153.0	160.2	127.0	135.1	147.8	148.0	86.8	111.0	117.5
4th quarter	124.6	74.8	128.4	123.5	119.5	131.2	155.8	162.0	129.7	135.2	150.1	151.3	87.1	119.2	116.1
1971 1st quarter	124.5	82.6	126.7	121.3	116.8	129.8	157.8	159.0	126.9	133.9	158.5	154.5	86.1	113.8	103.4
2nd quarter	126.3	82.1	127.8	124.1	117.3	137.1	158.9	160.3	130.6	136.5	152.8	158.0	83.6	121.6	106.6
February	123.6	83	125.9	121	117	129	160	159	127	134	156	153	86	114	103
March	123.1	83	124.7	123	117	134	154	162	123	128	170	159	86	102	100
April	126.4	83	127.9	124	116	139	159	157	131	143	167	156	84	119	103
May	126.1	82	128.5	123	117	135	166	156	133	136	156	160	84	128	110
June	126.4	81	127.1	125	119	137	153	168	127	131	136	158	84	118	107
July p	125.6	79	128.7	128	120	142	156	159	130	..	..	..	83	114	114
February-April (av.)	124.4	83	126.2	123	117	134	157	159	127	134†	159†	155†	85	112	102
May-July (av.) p	126.0	81	128.1	125	119	138	158	161	130	137†	153†	158†	84	120	110

	Manufacturing industries (continued)													Construction	Gas, electricity and water
	Metal manufacture			Textile, leather and clothing				Bricks, pottery, glass, etc.							
	Total	Ferrous	Non-ferrous	Total	Textiles	Leather, leather goods and fur	Clothing and footwear	Total	Bricks, cement, etc.	Pottery and glass	Timber, furniture, etc.	Paper, printing and publishing	Other manufacturing industries		
Weights	60	46	14	88	56	4	27	29	19	10	21	59	25	127	68
1966	111.3	112.4	107.7	106.8	107.6	101.5	105.8	115.8	117.8	112.2	109.6	114.6	119.8	115.3	116.9
1967	104.7	105.0	103.8	103.2	105.0	90.2	101.5	120.1	124.4	112.4	111.5	114.2	122.7	119.4	121.2
1968	111.1	111.2	110.8	113.1	119.2	93.3	103.7	127.3	130.3	121.8	118.5	118.3	135.2	121.8	128.2
1969	114.5	116.2	109.3	115.6	123.5	93.9	102.7	127.8	126.9	129.3	110.8	123.4	141.6	118.9	136.2
1970	114.9	116.6	109.2	116.6	124.9	92.9	103.1	125.2	122.4	130.3	113.6	120.5	145.6	115.7	143.8
1969 2nd quarter	116.2	116.9	114.1	117.1	125.5	94.5	103.3	129.4	129.1	132.3	108.3	122.5	143.6	121.8	133.7
3rd quarter	112.5	114.0	107.6	115.1	122.4	93.9	103.1	128.0	127.5	130.1	110.5	124.8	145.7	118.2	132.4
4th quarter	114.3	118.0	102.5	114.1	123.2	90.9	101.3	126.0	124.2	129.2	112.8	125.2	141.1	117.2	138.9
1970 1st quarter	116.5	119.0	108.5	115.1	123.2	91.6	102.1	122.3	117.1	131.8	106.6	123.6	144.2	114.8	146.1
2nd quarter	115.1	117.0	109.0	115.8	123.9	93.7	102.6	121.8	122.1	121.3	115.0	120.3	142.3	117.7	141.6
3rd quarter	113.8	115.8	107.4	117.7	126.8	93.6	102.6	128.8	126.5	132.9	113.2	120.5	146.2	116.6	143.6
4th quarter	114.0	114.6	112.0	117.8	125.9	92.8	105.0	127.9	123.8	135.1	119.7	117.6	149.5	113.7	143.8
1971 1st quarter	111.2	112.6	106.5	117.4	125.5	90.6	104.7	131.4	131.5	131.3	118.7	111.6	146.3	116.4	149.3
2nd quarter	101.6	101.6	101.3	117.0	124.3	87.6	106.3	134.4	132.8	137.4	117.9	117.2	150.0	120.1	157.6
February	110	112	104	116	125	89	100	133	132	133	120	109	147		146
March	104	106	99	116	124	89	104	133	134	131	111	112	149		151
April	105	106	102	116	122	88	107	133	134	133	122	117	151		157
May	105	104	106	120	126	87	112	134	131	138	118	116	145		148
June	95	95	97	115	124	88	100	137	134	141	114	119	154		168
July p	106	108	100	119	127	89	109	129	129	128	109	115			142
February-April (av.)	106	108	101	116	124	89	104	133	134	132	117	113	146†		151
May-July (av.) p	102	102	101	118	126	88	107	133	131	136	114	117	150†		153

† Latest available 3 months (April-June) and previous 3 months (January-March).

Index of industrial production for Wales for the second quarter

DURING the second quarter* of 1971 the Index of Industrial Production for Wales is estimated to have remained at 123 (seasonally adjusted), the level established during the previous quarter. A fall of 2 points has occurred since the corresponding quarter of 1970. In the United Kingdom the Index for the second quarter was 126.3, compared with 124.5 for the first, and 123.5 for the corresponding quarter of the previous year.

The Welsh Manufacturing Index, after having fallen by 3 points between the fourth quarter of 1970, and the first quarter of 1971, lost further ground during the second quarter, falling by an additional point to 133. The Index now stands at its lowest level since the first quarter of 1970. In contrast the United Kingdom Manufacturing Index rose from 126.7 in the first quarter, to 127.8 in the second, establishing a level 1.7 points above that of the corresponding quarter of 1970.

Comparison with UK Index

When considering the performance of Welsh Industrial Production over the quarter, vis-à-vis that of the United Kingdom, two factors need to be taken into account. First, the sharp drop in steel production resulting from a run-down of stocks, had a significant impact on the volume of Welsh Manufacturing output, which remains highly sensitive to the performance of the metal manufacturing sector. Secondly, a considerable proportion of the rise in the United Kingdom Index is attributed to special factors, reducing the significance of any direct comparison of relative movements in the respective indices. Nevertheless, the very marked improvement in the performance of the engineering and utilities sectors which occurred in the United Kingdom as a whole, was not reflected by their performance in Wales, where engineering suffered a slight fall, and the utilities only maintained the depressed level of the previous quarter.

Within the manufacturing sector, among those industries recording gains were coal and petroleum products (+5), chemicals and allied industries (+9), non-ferrous metals (+21)—this can largely be attributed to an increase in aluminium smelting capacity—and timber and paper (+8). Significant falls were registered in ferrous metals (−8), mechanical and instrument engineering (−6), and metal goods (−8).

Construction is provisionally estimated to have risen by 5 points, representing a marked improvement over recent performances. Mining and quarrying lost no ground over the quarter, and remains at the seasonally adjusted level of 66, compared with 67 in the corresponding quarter of 1970. Mining and quarrying in the United Kingdom, while falling slightly between the first and second quarters of this year, remains at a higher level than was recorded in any quarter of the previous year.

1963 – 100

SIC orders, 1968	1963 Weights per Thousand	Annual indices			Quarterly indices[1]							
					Unadjusted		Seasonally adjusted					
		1968	1969	1970	1970 Qtr. 2	1971 Qtr. 2	1970 Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	1971 Qtr. 1	Qtr. 2
Total: all industries	1,000	126	123	124	128	126	122	125	126	125	123	123
Mining and quarrying	142	89	78	66	70	68	69	67	71	55	66	66
Total: all manufacturing industries	650	132	131	135	139	137	131	135	137	137	134	133
Food, drink and tobacco	41	110	108	112	117	125	106	115	110	118	123	124
Coal and petroleum products	16	131	149	149	144	155	152	142	160	143	148	153
Chemicals and allied industries	47	162	160	160	164	175	157	159	162	162	162	171
Metal manufacture: total	227	109	102	109	115	103	104	109	114	108	103	98
Ferrous	198	108	100	109	114	99	103	109	114	109	102	94
Non-ferrous	29	115	116	110	118	131	112	114	113	103	106	127
Engineering and allied industries	167	152	155	157	163	160	150	160	157	159	159	157
Mechanical and instrument engineering	48	205	207	193	199	191	187	198	195	194	197	191
Electrical engineering	54	134	138	152	160	165	139	154	152	165	157	158
Vehicles (including aircraft)	30	132	145	152	157	153	149	154	152	153	150	149
Metal goods n.e.s.	34	121	118	115	121	116	114	116	113	118	119	111
Textiles, and leather and fur, and clothing and footwear	70	126	127	130	129	126	130	128	130	134	124	125
Timber, furniture etc., and paper, printing and publishing	35	145	162	165	165	174	162	163	163	171	164	172
Bricks, pottery, glass and cement etc.	21	183	159	163	168	177	157	164	160	173	171	173
Other manufacturing industries	26	147	156	155	161	161	155	156	155	154	155	157
Construction	128	134	127	130	139	137	130	139	120	131	131	136
Gas, electricity and water	80	123	127	130	126	123	130	129	133	129	127	127
For comparison: UK Index (key components)												
Total: all industries	1,000	119.8	122.9	124.1			123.8	123.5	124.3	124.6	124.5	126.3
Mining and quarrying	56	84.8	80.3	78.3			80.2	79.3	78.8	74.8	82.6	82.1
Total: all manufacturing industries	749	121.4	125.6	127.1			126.6	126.1	127.3	128.4	126.7	127.8
Metal manufacture	60	111.1	114.5	114.9			116.5	115.1	113.8	114.0	111.2	101.6
Engineering and allied industries	313	122.4	127.2	128.1			128.3	127.3	127.0	129.7	126.9	130.6
Construction	127	121.8	118.9	115.7			114.8	117.7	116.6	113.7	116.4	120.1
Gas, electricity and water	68	128.2	136.2	143.8			146.1	141.6	133.6	143.8	149.3	157.6

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* The above figures incorporate, in the light of the most recent information, amendments which have been found necessary to figures already published.

[1] Figures for the second quarter of 1971 can be regarded as being provisional for both Wales and the United Kingdom.

Synthetic resins and plastics materials January-March 1971

UNITED Kingdom production of synthetic resins in the first quarter of 1971 at 375.8 thousand metric tons was 6 per cent higher than in the corresponding quarter of 1970. Total production of thermosetting resins in the first quarter increased by 5 per cent and output of thermoplastic resins increased by 6 per cent. In the thermosetting group, output of alkyds increased by 18 per cent, while output of aminoplastics and phenolics and cresylics decreased by 1 and 2 per cent respectively. Production of polyesters fell by 8 per cent. In thermoplastics, output of polyvinyl chloride increased by 14 per cent. Output of polyolefines and polyvinyl acetate increased by 5 and 6 per cent respectively. The production and sales of plastics materials derived from primary synthetic resins in the first quarter of 1971 both increased by 12 per cent compared with the corresponding quarter of 1970.

Note

These quarterly statistics are published in the Business Monitor Production Series available on subscription from HM Stationery Office, PO Box 569, London SE1 9NH. The subscription rates are 37½p a year for each quarterly in the series. The subscription for monthly statistics in the series is £1.00 a year and there is also a reduced subscription rate of £25 a year for the whole series.

Release dates of economic statistics to be published in October

THIS notice is issued by the Central Statistical Office on behalf of the Government Statistical Service and other organisations as a guide to the dates of publication of major economic series in October. The dates are those which Departments, or other organisations concerned, are aiming at, and would normally expect to meet. Exceptionally, there may be a delay resulting from unavoidable statistical problems of collection and compilation. Further inquiries about individual series should be addressed to the source named.

Publication date	Series	Method of release *	Source
October 4 Mon	Hire purchase and other instalment credit business (Aug)	PN	DTI
	Retail trade (Aug)	PN	DTI
	National food survey report on consumption (2nd qtr)	PN	MAFF
	Official currency reserves (Sept)	PN	Treasury
5 Tues	Weekly fuel statement	PN	DTI
	Number of foreign visitors to Britain (Aug)	PN	DTI
	Consolidated Fund and National Loans Fund (Sept)	London Gazette	Treasury
7 Thurs	National Income and Expenditure (2nd qtr revised)	PN	CSO
	CBI Industrial Trends Survey	PN	CBI
11 Mon	Turnover of the catering and service trades (Aug)	PN	DTI
	Investment intentions of the manufacturing, distributive and service industries for 1971 72	PN	DTI
	Registered unemployed (final figures—Sept)	PN	D of Emp
	Employment in production industries (Aug)		
	Overtime and short-time working in manufacturing industries (Aug)		
12 Tues	Index of industrial production (Aug)	PN	CSO
	Weekly fuel statement	PN	DTI
13 Wed	United Kingdom overseas trade (Sept)	PN	DTI
14 Thurs	Capital expenditure by the manufacturing, distributive and service industries (2nd qtr—revised)	T and I	DTI
	Manufacturers' and distributors' stocks (2nd qtr—revised)	T and I	DTI
14 Thurs	Appropriation account of companies (2nd qtr)	PN	CSO
	Net acquisition of financial assets—analysis by Sector (2nd qrt)		
	Financial accounts of industrial and commercial company and personal sector (2nd qtr)		
15 Fri	Building Societies receipts and loans (Sept)	PN	BSA
	Crude steel production (Sept)	PN	BSC BISPA
17 Sun	National Savings monthly progress report (Sept)	PN	DNS
18 Mon	Turnover of the motor trades(Aug)	PN	DTI
	Consumers expenditure (3rd qtr—first preliminary estimate)	PN	CSO
19 Tues	Weekly fuel statement	PN	DTI
21 Thurs	Wholesale price index numbers (Sept)	T and I	DTI
	Registered unemployed (prov—Oct)	PN	D of Emp
	Unfilled vacancies (Oct)	PN	
	Basic rates of wages and normal weekly hours (end Sept)	PN	D of Emp
	Monthly index of average earnings (Aug)		
22 Fri	New car registrations (Sept)	PN	Dept of Environment
23 Sat	Retail price index (Sept)	PN	D of Emp
25 Mon	Engineering industries deliveries and orders (Aug)	PN	DTI
26 Tues	Weekly fuel statement	PN	DTI
	Construction—new orders (Aug)	PN	Dept of Environment
27 Wed	Borrowing by local authorities (2nd qtr) (E)	Fin. Stats	CSO
	Central Govt. borrowing requirement (Sept) (E)	Fin. Stats	CSO/Treasury
	Capital issues and redemptions (Sept) (E)	Fin. Stats	Bank of England
	Electricity generation (Sept)	PN	DTI
28 Thurs	Slum clearances (2nd qtr)	PN	Dept of Environment
	Housing starts and completions (Sept)	PN	Dept of Environmrnt
	House improvement grants (Sept)		
	Stoppages of work due to industrial disputes (Sept) (E)	Gazette	D of Emp

* PN = Press Notice.

Registrations of British and foreign films

The following are details of films registered by the Department of Trade and Industry under the Films Acts 1960 to 1970 during the week ended Friday, September 17, 1971. BR/E indicates that the film is a British quota film.

Title of film	Registered No.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
			BRITISH		
The Line	BR/E 35682/18/9/76	17	September 13	Columbia Pictures Corporation Ltd.	New Zealand National Film Unit
Arabian Journey	BR/E 35688/18/9/76	30	September 14	MGM-EMI Distributors Ltd.	Associated British Pathe Ltd.
Squeeze a Flower	BR/E 35689/18/9/76	90	September 14	MGM-EMI Distributors Ltd.	N.L.T. Productions Pty. Ltd.
Aphrousa	BR/E 35691/18/9/76	26	September 15	Border Film Productions (London) Ltd.	Mercury Sound Facilities
Barry Brickell: Potter	BR/E 35692/18/9/76	9	September 15	Columbia Pictures Corporation Ltd.	New Zealand National Film Unit
She'll Follow You Anywhere	BR/E 35693/18/9/76	96	September 16	Scotia-Barber Distributors Ltd.	Glendale Film Productions Ltd.
Movietone News 2206	BR/E 35581/18/9/76	8	September 17	Twentieth Century-Fox Film Co. Ltd.	British Movietonews Ltd.
Movietone News 2206A	BR/E 35582/18/9/76	8	September 17	Twentieth Century-Fox Film Co. Ltd.	British Movietonews Ltd.
			FOREIGN		
Mad Doctor of Blood Island	F 35683	88	September 13	Westland Film Distributors Ltd.	Hemisphere Pictures Inc.
Brides of Blood	F 35684	83	September 13	Westland Film Distributors Ltd.	Hemisphere Pictures Inc.
Secret Africa	F 35685	94	September 13	Columbia Pictures Corporation Ltd.	Sahara Film S.N.C., Rome
A Gunfight	F 35686	89	September 14	MGM-EMI Distributors Ltd.	Harvest Productions Inc. and Thoroughbred Productions Inc.
Norwood	F 35687	95	September 14	Paramount Pictures (UK) Ltd.	Joseph H. Hazen Productions and Paramount Pictures Corporation
Mad Dogs & Englishmen	F 35690	111	September 14	MGM-EMI Distributors Ltd.	A & M Films
The Novices	F 35694	90	September 16	Scotia-Barber Distributors Ltd.	Les Films La Boetie, Paris
Code Name Kill	F 35695	85	September 16	Rank Film Distributors Ltd.	Franz Seitz Film, Munich

Correction to the Register:

The name of the maker of the film 'Die Screaming Marianne' (BR/E 35648/14/8/76) has been corrected to 'Pete Walker Film Productions Ltd.'

Amendments to the Register:

The playing time of the film 'The Last Warrior' (F 35187) registered on December 8, 1970, has been amended to 94 minutes.

The playing time of the film 'Bread' (BR/E 35470/8/5/76) registered on May 5, 1971, has been amended to 62 minutes.

Production of man-made fibres in July

THE volume of production of man-made fibres in July was 2 per cent more than in July 1970.

Total production by weight of man-made fibres in July was 1 per cent less than in July 1970 with output of continuous filament 7 per cent more and staple fibre 7 per cent less.

MAN-MADE FIBRE PRODUCTION

Thousand metric tonnes (†)

		Total	Continuous filament (singles)	Staple fibre
1964		374.3	171.5	202.8
1965		391.0	179.8	211.2
1966		399.9	186.6	213.3
1967		433.2	198.9	234.4
1968		539.1	241.8	297.4
1969		553.9	252.5	301.5
1970		599.4	257.6	341.9
1969	1st quarter	141.9	65.3	76.6
	2nd quarter	143.7	64.7	79.0
	3rd quarter	125.8	57.6	68.2
	4th quarter	142.6	64.9	77.7
1970	1st quarter	146.8	63.4	83.4
	2nd quarter	155.7	67.6	88.0
	3rd quarter	148.7	60.7	88.0
	4th quarter	148.3	65.8	82.5
1971	1st quarter	157.2	72.1	85.1
	2nd quarter	153.2	69.5	83.7
1970	February	45.5	19.6	25.9
	March	51.0	21.8	29.2
	April	52.8	22.6	30.1
	May	51.6	23.0	28.6
	June	51.3	22.0	29.3
	July	52.2	21.3	30.9
1971	February	48.3	22.3	26.0
	March	56.7	25.2	31.5
	April	51.0	22.4	28.6
	May	52.9	24.5	28.3
	June	49.4	22.5	26.8
	July	51.6	22.8	28.8

(†) From July 1967, the production figures for continuous filament yarn are on an 'actual weight' basis; previously figures were on a 'delivered weight' basis which is approximately 3 per cent less than the corresponding' actual weight'.

INDEX OF THE VOLUME OF PRODUCTION OF MAN MADE FIBRES 1963 = 100

		Actual	Seasonally adjusted
1964		117	
1965		129	
1966		142	
1967		154	
1968		201	
1969		213	
1970		238	
1969	1st quarter	216	204
	2nd quarter	221	211
	3rd quarter	199	220
	4th quarter	216	218
1970	1st quarter	228	214
	2nd quarter	248	236
	3rd quarter	234	258
	4th quarter	241	243
1971	1st quarter	263	252
	2nd quarter	253	242
1970	April	253	237
	May	249	233
	June	243	238
	July	238	252
	August	219	259
	September	244	263
	October	240	247
	November	251	248
	December	233	233
1971	January	256	248
	February	263	250
	March	271	257
	April	255	239
	May	258	244
	June	246	243
	July	244	256

The actual figures allow for differences in the length of calendar months but not for holidays or other seasonal variations. The seasonally adjusted figures are based on the seasonal pattern up to the end of 1970, and may be subject to slight revision when the complete figures for 1971 are incorporated. Figures for earlier periods were published in the *Board of Trade Journal* dated February 11, 1970 (page 375).

Inside the new Qualitex Yarns centralised distribution centre at Radcliffe. This is the export yarns storage bay, where large consignments are assembled for delivery. Designers and builders of Qualitex Ltd.'s distribution centre—said to be Britain's largest single textured synthetic yarn distribution centre—are IDC Ltd., Stratford upon Avon.

TRADE PROMOTION

EXHIBITIONS and FAIRS

Hamburg Trade Week under way

JOINTLY sponsored by the Department of Trade and Industry and the British National Export Council, the British Trade Week in Hamburg was officially opened on September 17 by the Secretary of State for Trade and Industry, Mr. John Davies. This major event is promoting British capital goods, durable and non-durable consumer products and the invisible sector by means of seminars, conferences and retail promotions.

The seminars, with supporting displays, are conducted by speakers from British industry. They feature advanced British techniques; bio-medical engineering; advanced nuclear technology; and applications of low cost process control computers and numerical control in small and medium size firms.

One-day conferences deal with licensing and the exchange of know-how between Britain and West Germany; airport development; and urban transport planning. There are also meetings between British and German commercial interests to consider banking, insurance and trade.

Retail promotions are taking place in Hamburg's most important stores and speciality shops. Several department stores supporting the Trade Week belong to nationwide groups in which central buying is normally the rule. The Hamburg promotion might well lead to British goods being stocked throughout entire groups whose total annual buying is around £500 million. To back up these promotions, there is a traditional British background of military bands, policemen, buses and street decorations.

In the Planten un Blomen park exhibition, a British Household Exhibition co-ordinated by the Department of Trade and Industry includes a consumer durables display, furniture, furnishing, carpets, novelty metal giftware, and a spectacular show of British fashion wear. Other organisations sponsoring these supporting events are the British Carpet Export Promotion Council, the Clothing Export Council, the British Furniture Manufacturers Export Club, and the British Art Metal Export Group.

Good number of orders at IFIP Congress and exhibition

From the British Consulate General, Zagreb

YUGOSLAVIA which, with about 340 computers installed, is fast becoming a medium-developed country in the field of electronic data processing, was host for the 4th Congress of the International Federation of Information Processing, held in Ljubljana from August 23-28. The event featured prominently in the local press and its significance was underlined by the fact that the Congress took place under the patronage of President Tito.

While the Congress itself, with about 2,500 participants (240 of them from the United Kingdom) and 218 papers read, concentrated on the scientific aspects of data processing, the accompanying exhibition was a purely commercial venture, with 90 exhibitors from 18 countries. Prominent among them were exhibitors from the United Kingdom, organised in a joint venture between the Department of Trade and Industry and the Business Equipment Trade Association of London.

By all accounts, the event was an unqualified success. The site and layout were among the best in the exhibition and drew favourable comment. Attendance was higher than expected and our exhibitors could not complain of any lack of interest. Lively discussions were taking place on most of the stands and many valuable commercial contracts were made, some of which may lead to substantial orders. The fact that the exhibition was held at the same time as the international congress, with visitors from many countries, certainly enhanced its value to our firms. Orders and serious inquiries were reported from countries such as the United States, West Germany, Poland, Hungary and, of course, Yugoslavia.

Obviously IFIP Congresses are worthwhile events for the promotion of our electronic data processing industry. This feeling is shared by organisers and exhibitors alike. If the practice of combining an IFIP Congress with an exhibition is continued, and if firms again take part in the same well organised manner, the overall impact of the British presence can but be beneficial to all.

Mr. G. Allen and Mr. J. Okkerse of Triumph Engineering Co. Ltd., look on as Mr. Michael Noble, Minister for Trade at the Department of Trade and Industry, tests an Ariel three-wheel motocycle during the New Zealand International Trade Fair.

Record public attendance at New Zealand Trade Fair

From the British High Commission, Wellington

NEW Zealand's International Trade Fair, which opened to the public on August 20, attracted a record attendance of 265,000.

Seventeen countries participated in the Fair, the largest yet in Wellington. Once again Britain, with 20,000 square feet indoors and 1,500 square feet outdoors, was the largest individual exhibitor followed by Australia and Japan.

Many of the displays included a selection of consumer goods despite the continuation of import licensing restrictions, which preclude increased sales in the immediate future. The overall emphasis, throughout the Fair, however, was on heavy machinery and equipment and motor vehicles.

Over 70 British firms displayed their goods in the British Court in conjunction with 36 New Zealand subsidiaries or agents. In the machinery and equipment display machine tools, electric controls, electronic and mechanical precision measuring instruments, cable handling equipment polishing machinery, printing accessories, a large plastic injection moulding machine, a smokeless incinerator, an electrically powered forklift turret truck, paint spraying equipment and a comprehensive range of hand tools were amongst the highlights.

Consumers were not forgotten. In addition to a display of 10 motor cycles arranged by the Association of Cycle and Motorcycle Manufacturers two local agents had varied and interesting displays of motorcycles. The new three-wheel machine especially suitable for ladies aroused particular interest amongst the general public. There were also displays of metric weighing equipment, fine china, crystal, glass and pottery, Scotch whisky, cigarette lighters, and shipping, financial and travel services.

British Day was celebrated on Monday August 23. Mr. Michael Noble, Minister for Trade, spoke at a morning reception attended by some 450 leading business and professional personalities and representatives from press, radio and television. The Minister subsequently addressed a luncheon given in his honour by the British Trade Association.

British Day was also the climax of a naval visit by the aircraft carrier HMS *Eagle* and the support ships *Tideflow* and *Resource*. The Royal Marine Band played in the theatre at the Trade Fair during the British Day reception and also Beat the Retreat at the town hall and the show ground in the evening. Films of Britain were shown in the international lounge in the Fair building.

Ten leading shops and stores in Wellington arranged special window displays of British consumer goods to compensate in part for the inevitable emphasis on machinery and equipment at the Fair itself.

The official opening had been preceded by three Trade Days which the majority of exhibitors in the British Court regarded as very satisfactory and well up to expectations.

International poultry show cancelled

THE International Poultry Show due to be held at Olympia, London, from December 14-16 has been cancelled.

Organisers: ITF/Iliffe Exhibitions Ltd., Commonwealth House, New Oxford Street, London WC1A 1PB.

Moscow show confirms opportunities for British manufacturers

From the British Embassy, Moscow

A SPECIALISED exhibition, 'Khirurgia' (Surgery), was held in Moscow from August 20-28 in connection with the XXIVth International Congress of Surgeons and the Xth International Congress on Cardio-Vascular Diseases. Organised by the All-Union Chamber of Commerce in concert with the Soviet Ministries of Health and for the Medical Industry, it came at an opportune moment in the early stages of the new Soviet Five-Year Plan (1971-5), the directives for which include long-range plans to tackle major scientific and practical problems (including those of increased use of computers) of research, diagnosis, treatment and surgery in various areas of the Soviet health service.

Firms from a number of Western countries, as well as from organisations within the Comecon group, took part. There were sizeable exhibitor groups from the US, Sweden, Holland, West Germany, and other exhibitors from France, Italy, Austria and Denmark. The British section, organised and sponsored by the Department of Trade and Industry in conjunction with the British Hospitals Export Council and housed advantageously in a separate pavilion, comprised exhibits from 21 firms and made a good impression over a wide range of products from sutures, tubing and disposable electrodes and other materials to hyperbaric, cardiographic, anaesthetic equipment and sophisticated monitoring systems.

Significant progress

British exhibitors were generally well pleased with the contacts and discussions which the exhibition enabled them to have with large numbers of Russian surgeons, doctors, medical specialists and technicians, providing the opportunity to promote their products. A number of them were in fact able to make significant progress with the Ministries concerned and with Medexport, the State Trading Organisation, on various proposals under negotiation, and still more succeeded in selling a fair proportion of the equipment they had on display.

Prominent amongst these latter firms were Vickers Medical Engineering Ltd. (who sold equipment to the value of £22,300), Cambridge Scientific Instruments Ltd., Sonicaid, Cyprone, Cardiac Recorders and Medelec. So far as other immediate business is concerned, the most notable success was achieved by London Rubber Industries who obtained orders for 1½ million pairs of surgeons' gloves to add to the million pairs they have already supplied to the USSR this year.

The Soviet Union has not previously been a major importer of medical equipment from the West, but her apparent concern with the technological level of equipment and materials in her health service should offer opportunities for British firms to do worthwhile business in this field. The 'Khirurgia' exhibition underlined this. The Department of Health and Social Security, whose representative at the exhibition was able to provide valuable assistance to participating firms, have expended a great deal of effort over the past 18 months in fostering the activities of the Anglo-Soviet Working Group on Medical Instrumentation. This work appears now to be bearing fruit.

'Fine foods from Britain' display at Irish Fair

From the British Embassy, Dublin

THE products of 48 British manufacturers—a record number—were brought together in the 13-stand British section of Ireland's third International Food and Drink Fair. Held from September 4-11 at the Royal Dublin Society's Ballsbridge Exhibition Halls, the Fair was sponsored by the Irish Retail Grocery, Dairy & Allied Trades Association and organised by Industrial & Trade Fairs (Ireland) Ltd.

Despite scorching temperatures, capacity crowds thronged Ballsbridge during the public hours and it was no fault of either the organisers or the 70-plus exhibitors that widespread power cuts on the last three of this eight-day event caused attendance to drop below previous record levels.

The Fair, which was opened by Mr. P. J. Lalor, Ireland's Minister for Industry and Commerce, also incorporated a shop equipment show. It was truly international and, in addition to Britain, attracted participation by Australia, Bulgaria, France, Israel, the Netherlands and Russia.

The British stand, sponsored jointly by the British Food Export Council and the Department of Trade and Industry, occupied a prominent position in the main hall and offered, on 10 stands, a wide variety of attractive products under the banner 'Fine Foods from Britain'.

As in previous years, several stands were occupied by Irish distribution companies offering composite displays of their principals' products. Two equipment manufacturers were adopted for the occasion by the Food Export Council to make up the strongest British presence so far seen at this Fair and also to make the British section by far the largest.

A very healthy level of trade inquiries was maintained throughout the event and most exhibitors were convinced that their presence had been well worth while. The strength of this presence did no more than reflect Ireland's important position as Britain's third largest export customer. Its 2.9 million people each spent £120 on British products during 1970.

Despite the importance of its agriculture and its large food processing industry, Ireland bought British food and food products worth over £13 million last year and was Britain's best customer for processed foods with imports valued at £7 million.

The 9th International Conference on Medical and Biological Engineering, together with its supporting commercial exhibition, took place at the Medical Centre of the University of Melbourne from August 23-27. The conference, which is held biennially, attracted 830 delegates of whom over 300 came from overseas countries. Nearly 50 firms took part in the exhibition of Bio-medical Equipment of whom half were international suppliers. Fourteen British firms were represented in a joint venture group sponsored by the British Hospitals Export Council and the Department of Trade and Industry. The UK Biological Engineering Society demonstrated a range of equipment on behalf of some of these companies, and also manned an information stand. Here, Mr. D. P. Gordon, product manager, Vickers Ltd.(Medical Engineering) explains dual channel '300' automatic biochemical analysis system to customers.

Export services on show at Olympia

HIGHLIGHTING the services available to exporters on the Department of Trade and Industry stand at the 5th Export Services Exhibition at Olympia September 13-17, 1971 was a flow chart display of the Department's Export Intelligence Service.

The service uses a computer to process the incoming overseas market intelligence received daily from over 220 commercial teams in British Embassies, Consulates and High Commissions all over the world. Selected to suit their day-to-day business requirements, the information is fed to thousands of firms throughout the United Kingdom.

Other ancillary services featured showed the Department's regional office organisation where each office has a team of experienced officers ready to advise industry in its area on export problems.

The fourth Asian regional conference and exhibition on soil mechanics and foundation engineering was held recently in Bangkok, Thailand. It was opened by the Deputy Prime Minister of Thailand, Mr. Pote Sarasin who is seen here (left) with conference chairman, Dr. Za-Chien Moh (centre) and the marketing manager of Engineering Laboratory Equipment Ltd., Hemel Hempstead, Mr. P. E. Denton.

MISSIONS and TOURS

3,000-mile European sales trip

AN Ipswich company, which manufactures and markets a range of generators and electrical equipment for the marine market, has launched a major sales campaign in Italy and France, as part of a policy of general sales promotion in the Common Market countries.

G & M Power Plant Co. Ltd. have fitted out a purpose-built sales demonstration vehicle with several models from their range of marine generating sets, cooking, water heating and toilet units. The vehicle set off, at the beginning of September, to make a 3,000-mile journey around the Mediterranean coasts of France and Italy. Calls will be made at such places as Genoa, Rome, Toulon, Nice and Cannes, where G & M's equipment will be demonstrated to boatbuilders and marine dealers.

Crewing the demonstration vehicle for the six weeks of its trip will be three of G & M's sales team: Messrs. Tony Cook, Terry Clark and Ray Porter.

Exhaustive market surveys have been carried out during the past few months, and the company is convinced that there is great sales potential for its products in the countries concerned.

Journalists for Electrex '72

TECHNICAL editors from 10 of Europe's leading electrical journals have been invited to spend three days in London at the end of October as guests of the organisers of Electrex '72.

The mission, sponsored by the British National Export Council and BEAMA, will be given a full briefing on the exhibition in particular and the electrical industry in general.

The editors will be coming from Austria, Belgium, Denmark, France, Germany, Holland, Italy, Sweden and Switzerland.

Jet boost to sales

FROM a factory visit in Cheshire to meeting Yugoslav customers in Zagreb, all within four hours, is a typical intinerary for Mr. Ian Weston Smith, managing director of The Morgan Crucible Co. Ltd. and chairman of Morganite International Ltd. This magic carpet approach to a day's business is part of the growing success story of the HS125 business jet.

Shortly before noon on September 14 an HS125 landed at Hawarden Airport, Cheshire, to collect Mr. Weston Smith and flew on to Gatwick to pick up a top-level sales team bound for the Zagreb Autumn Trade Fair at which Morganite International were exhibiting.

The team travelling with Mr. Weston Smith included Mr. J. H. Baumann, managing director of Morganite International, executives from five of the company's export partners, and Mr. C. D. Putler of Hawker Siddley Aviation Ltd.

The jet, which flew on to Bucharest on September 16 before returning to Gatwick the next day, is one of many measures planned to boost Morganite International's sales effort in Eastern Europe. It enables MIL directors and accompanying executives to attend a number of meetings with both Yugoslavian and Romanian officials and customers.

Total Morganite International sales to Comecon countries in 1970 exceeded £1 million and continuing expansion of these markets is already reflected in sales of £1 million in the first six months of this year.

American visit

SIR RUDY STERNBERG, chairman of the British Agricultural Export Council, visited the United States recently in an effort to gain more exports for Britain's agricultural industry. His visit was made at the invitation of Mr. Clifford M. Harding, Secretary of Agriculture, whom he met on September 15.

Sir Rudy discussed with Mr. Harding the possibility of co-operation between the two countries in joint export ventures on a worldwide basis.

German visit

A FOUR-MAN team of top executives from Vinyl Compositions (Holdings), Manufacturers of vinyl compounds, dry blends and pastes, Bollington, Cheshire, were setting off on September 19 to investigate latest plastics-industry trends in Germany.

Led by Mr. Ken Burgess, managing director, they will visit an international plastics exhibition and seminar at Düsseldorf during their five-day stay and investigate new factory manufacturing developments.

Customs notices of interest to exporters

THE following Public Notices issued by HM Customs and Excise relate to various aspects of export procedure. Copies of these Notices may be obtained from the local Officer of Customs and Excise, whose address appears in the telephone directory and to whom all inquiries should be addressed, or from the Secretary, HM Customs and Excise, 39-41 Mark Lane, London, EC3R 7HE.

General Notice	
49	Temporary importations: international co-operation.
77E	Purchase tax-exports.
77X	Purchase tax—retail export schemes.
104	Temporary importations and exportations under ATA and ECS Carnets.
112	Authorised hours for Customs work at ports, airports and in long rooms and charges for attendance given at the request of merchants.
118	Samples required for the purpose of promoting exports from the United Kingdom: admission without payment of Customs duty and purchase tax.
206	Export trade reliefs: temporary importation for process or repair.
207	Reimported goods: relief from Customs duty and purchase tax.
210	Temporary importation of films and similar goods for copying, printing, etc., to fulfil export orders.
215	Relief from Customs duty and purchase tax on importations of goods intended for export which are not otherwise eligible for relief.
275	Documentation of Exports for Statistical Purposes
290	Export of personal and household effects.
300	Export reliefs scheduling scheme.
466	Export documents and trade statistics.
467	The New Customs Tariff and Overseas Trade Classification
Exchange Control	Notice to Exporters. Issue dated September 1970. (Issued by HM Treasury—also obtained from any bank.)
Drawback	
7	Drawback on mixed or blended beers when exported or deposited in bonded warehouse.
74A	EFTA drawback: exception of EFTA goods re-exported to another EFTA country.
77M	British-made cars and motorcycles; tax free sales to tourists, etc.
132	Sugar: all matters relating to the importation, warehousing and export of sugar and sugar goods, and to the use of surcharge-free sugar for certain purposes.
172	Hydrocarbon oils: drawback of duty.
218	The conditions and procedures under which drawback of import duty may be claimed on goods which are exported in the same state as they were in when imported.
219	The conditions and procedures under which drawback of import duty may be claimed upon the exportation of goods produced or manufactured in this country from imported materials.
224	The examination of bottled beer, exported on drawback, at the premises of a licensed brewer for sale, or beer dealer, as an alternative to examination on the quay.
291	Claims for drawback on goods exported where there has been a variation in the duty rate.
372	Notice to exporters and other traders regarding goods exported, shipped as stores or deposited in bonded warehouse on drawback; authorisation of signatories to drawback claims.
430	Tables of rates of sugar surcharge, distribution payments and corresponding repayments.
430A	Table of rates of sugar surcharge and distribution payment on imported invert sugar and other imported goods containing sugar and repayment rates of exported invert sugar and exported beer.

EXPORT ORDERS

Hotel installations

British Relay Ltd., Crawley, Sussex, is currently engaged on hotel communications and television contracts totalling £1.5 million. These contracts are for the sale or rental of a range of installations, including electronic room status, message-waiting and morning-call systems, and radio and television systems (in some instances covering the supply of up to 850 colour receivers to a single hotel).

Installations include new hotels in South America, the Caribbean, Cyprus, Gibraltar, Madeira, Sweden and the Middle East.

Electrification in Labrador

BIC Construction Co. Ltd. (Balfour Beatty group of BICC) has received a contract worth some $270,000 from the Iron Ore Company of Canada to renew the overhead catenary system for its existing automatic train operation at Labrador City and provide additional catenary for an expansion of the system now being built. The total length of the railway is some 17½ miles and the system operates at 2,300 volts.

The work on the overhead catenary system is being undertaken in accordance with the recommendations of the Traction and General Division of BIC Construction Co. Ltd.

Two-way radios ordered

Pye Telecommunications Ltd. has received an order worth over £50,000 from its West German distributors, Tekade, Felten and Guilleaume, for a large quantity of Pye Motafone two-way radios. This follows closely the Motafone launch in West Germany and its successful first showing at the Hanover Fair three months ago.

The Motafone is claimed to be ideally suited to use in West Germany, offering FM and three-channel operations.

Control panels ordered

Switchgear and Instrumentation Ltd., Bradford, panel manufacturing engineers, recently supplied a control panel worth about £11,000 for the paste plant of an aluminium smelter in Bahrain.

Deliveries have also begun of a suite of panels worth about £10,000 for a paper mill at Riga, Latvia.

The company is also providing instrumentation control panels, valued at about £35,000, for oil refining plants in various parts of Iran.

Pumps for Royal Dutch Navy

Screw pumps with constant output at varying speeds—claimed to be the only ones of their kind in the world—have been designed by Stothert and Pitt Ltd., Bath, for the Royal Dutch Navy. Four have been ordered at a cost of £50,000 to pump lubricating oil to the gas turbine units which will power two new frigates being built by NV Koninklijke Maatschappij 'De Schelde' at Flushing.

Steam boiler for Ghana

Guinness Overseas Ltd. are taking delivery of what is said to be the first 'Jet Type' high-voltage electrode steam boiler of this type ever to be manufactured in Britain. The boiler, by Parkinson Cowan GWB of Dudley, is part of a complete packaged deal, including water treatment plant, for the Guinness Brewery at Kumasi, Ghana, being supplied by Parkinson Cowan International.

For US Christmas trade

Another 10,000 Navigator handlamps from Bardic Systems Ltd., Southampton, have been sold to America for the Christmas market. This follows an initial order placed last year by the same customer, the Ashflash Corporation of Connecticut.

For America, Bardic are supplying a twin-tubed version of the standard 12-in. fluorescent-tube Navigator lamp. It will be marketed under the name Discoverer V in a specially designed pack.

Protection for terminal

Wilson, Walton International Ltd., Croydon, corrosion engineers, have received an order valued at £70,000 for the cathodic protection of the Kharg Island tanker terminal in the Gulf area. The $17 million Kharg IV project, as it is known, involves the creation of the largest artificial sea island terminal in the world, designed to berth and load crude oil tankers of up to 500,000 tons dw.

Flour storage plant for India

Henry Simon SA, Paris, in conjunction with the Flour Milling and Food Engineering Division of Henry Simon Ltd., Stockport, have received an order for the supply and installation of materials handling plant, worth approximately £200,000, for the Wallace Flour Mills Co. Ltd., Bombay, the largest flour milling group in India.

Henry Simon will be responsible for the design, erection and commissioning of the equipment. It will be the first Simon bulk flour storage plant to be supplied to India.

Instruments for Newfoundland

VutroniK electronic instrumentation and controls, manufactured by Honeywell Ltd. at its Uddingston, Lanarkshire, factory, have been chosen for the new Come-By-Chance refinery in Newfoundland. The contractor for the refinery is Procon (Great Britain) Ltd., for the Provincial Refinery Co. Ltd.

The initial order is for some 400 transmitter/receiver control loops for the first eight plant units. A further four plant units are undergoing final engineering and this will result in the addition of approximately 200 more loops of instrumentation.

Total value of VutroniK instruments, including those from the boilermakers and other sub-contractors, is expected to be in excess of £300,000.

Nitrogen plant in Indonesia

Air Products Ltd., New Malden, Surrey, has been awarded a £150,000 contract to build a cryogenic nitrogen plant in Indonesia. The order—the first of its type to be won by Air Products in Indonesia—was placed by Bechtel International on behalf of PertaMina and calls for the design, manufacture and construction of a high-purity nitrogen plant at the Puldja, Pallembang, oil refinery of PertaMina.

Flame detection system for Trinidad

Peabody Ltd., London, chemical and combustion engineers, have completed the design and manufacture of a flame monitoring and alarm system for the protection of three 240,000 lb./hr. boilers at Penal Power Station, Trinidad, owned by the Trinidad and Tobago Electricity Commission.

Radio equipment for Somalia

The Government of Somalia has signed a contract worth more than £340,000 with International Aeradio Ltd. to provide air traffic control and telecommunications equipment for the flight information centre at Mogadiscio.

The equipment will include an extended-range ground/air VHF system, equipment for radio teleprinter and speech communication with the flight information centres at Addis Ababa and Nairobi and with the airport at Hargeisa, and a VHF omni-range system (VOR) for the navigation of aircraft approaching Mogadiscio. Delivery of the equipment will extend over the next two years.

Switchboard for survey ship

Aish and Co. Ltd., electrical engineers of Poole, Dorset, recently delivered an electrical control switchboard for a 2,750-ton hydrographic survey ship being built for the South African Government. The order was placed by Yarrow (Shipbuilders) Ltd., Glasgow, where the ship is under construction.

Aish have also supplied further equipment comprising communications and other control switchboards, fuseboxes, and ancillary installations.

Maps on the move

Ferrymasters Ltd.—the P & O Group's international hauliers—recently moved over 2½ million maps weighing 200 tons from Germany to England for the United States Army in Europe.

USAREUR sought Ferrymasters' aid when reorganisation of Army map holdings called for all stocks to be transferred from Pirmasens in Germany to a new storage site at Burtonwood, Lancs.

The maps, measuring 25,000 cu. ft. and weighing more than 200 tons, were transferred in only two weeks; the total consignment included 2,000 containers and about 12,000 line items.

South American orders

Two South American orders worth £230,000 have been won by Pilkington—the largest orders for architectural glass ever received by the group from that area. Over 312,000 sq. ft. of clear, toughened and solar-control glass will be supplied from the St. Helens, Lancs., group headquarters, for two new prestige office buildings in Santiago, Chile, and Lima, Peru. Delivery begins before the end of the year.

Solar-control glass—Spectrafloat—is claimed to reject about a third of the sun's heat and reduce brightness to give more comfortable visual conditions.

£3.2 million order

John Brown Enginering (Clydebank) Ltd. has won a £3.2 million order to supply on a turnkey basis a complete 60-MW gas turbine power station for the Electricity State Board of Burma.

The order—JBE's first in Burma—was won against intense competition from Japan, Germany, and Italy, and consolidates the company's position in the Far East where it has already 11 turbines operating or delivered to Australia, Brunei, Hong Kong, and Thailand.

The station will be built at Chauk, 400 miles up the Irrawaddy and three heavy-duty gas turbines each weighing 80 tons, will be taken up on barges, which will be possible only during the monsoon period of July and August next year when there is sufficient depth of water.

£7 million Middle East contract

A £7 million contract has been awarded to an Anglo/German consortium by the Government of the Yemen Republic. The contract consists principally of upgrading and realignment of the Sana'a to Taiz highway (256 Km) and includes extensions to the Sana'a airport.

The consortium is sponsored by Dr. Ing. Trapp and Co. Construction GmbH, although Tarmac Construction Ltd., Wolverhampton, will have the largest financial interest (40 per cent) and will be the coordinating contractor. The third partner will be E. Heitkamp GmbH.

Tarmac Construction has won a number of multi-million pound orders in the Middle East in the last years—eg a £3 million hospital was completed recently in Jordan; the company is currently working on a £1 million-plus port development at Sharjah; a £1 million airport for jumbo jets at Bahrain; oil installations on Das Island and water exploration in Abu Dhabi.

Melting plant contract

Birlec, the GEC furnace company of Aldridge, Staffs, in collaboration with The General Electric Co. of India Ltd., have won the melting plant contract for the Khetri Copper project at Rajasthan. The contract has been placed by Hindustan Copper Ltd., an Indian Government company, at a value of over £550,000. The installation, claimed to be the largest copper melting plant in India, is to be used for making 'wirebars' from which copper wire is drawn.

The plant, to be built to Birlec design partly in India and partly in the UK, will have as the prime melter a Birlec 40-ton-capacity arc furnace rated at 4,000 kVA. The installation will produce 15 tons of copper 'wirebars' an hour.

Buses for Barbados

For service on the narrow, hilly roads of Barbados, Seddon Motors Ltd., Oldham, have produced a version of the Pennine IV bus which is 7 ft. 6 in. wide. Twenty-three of these 30-ft.-long, right-hand-drive, 41-seaters are now being delivered. Ample power for hill climbing is provided by the front-mounted Perkins 167-hp V8 engine, which drives through a five-speed ENV synchromesh gearbox to the Seddon 5.57/1 axle, which is rated at 9 tons. A 6-ton front axle is used.

Success in French market

Despite the import tariff wall of 18 per cent, Ceag Ltd., Barnsley, Yorks., manufacturers of Lumax automotive auxiliary lamps, now hold a secure 10 per cent of the French market. This penetration has been achieved despite the fact that the market is highly competitive, France being the home of at least two internationally known automotive lamp manufacturers.

On his most recent visit to Europe Mr. Critchley, the company's sales director, brought back orders for Lumax lamps from a large large number of countries, including one order for 30,000 from France and a follow-up order for 10,000 into Belgium and Holland.

Largest contract

A major contract, conservatively estimated at being worth between £300,000 and £500,000 and believed to be one of the largest landed by a United Kingdom vending machine manufacturer, has been won by Vending Centre (Holdings) Ltd., Watford, Herts.

The British company specialises in the development and manufacture of drinks vendors. The contract effectively doubles the company's already healthy export sales.

Computer facilities for contractors

All three major contractors (including Stone & Webster Engineering Ltd., London) working on a new petrochemical complex at Moerdijk, Holland, are using computer processing facilities provided by Baric Computing Services Ltd. in London, to obtain up-to-date management information and monitor progress on the project.

The complex, which will cost over £100 million, is being established by Shell Nederland Chemie NV. It is scheduled to come into operation during 1973.

Baric Computing Services Ltd.—owned jointly by International Computers Ltd. and Barclays Bank—provides a comprehensive PERT computer processing service which has been used to provide management information for more than 1,000 major projects.

250th sale of HS125

Hawker Siddeley celebrated the 250th sale of the HS125 business jet with a 'fly-in' on September 15 to the Hatfield plant of some leading European owners. The sale—through Beechcraft Hawker in the United States to Mr. Dennis O'Connor of Houston, who has large oil interests in Texas—was one of two recorded recently by the North American sales organisation, which brings total HS125 export orders to 203. A further sale by HSA in the United Kingdom makes the total order book 252 aircraft.

The HS125 therefore overtakes the HS 748 twin-turbo-prop feeder liner (250 sold) as Britain's current best-selling turbine-powered civil aircraft.

HS125 business jets have been sold to civil and military customers in 22 different countries. The total value of all sales is over £70 million. Export sales are worth over £54 million and represent 80 per cent of all aircraft sold. The best export market is North America, where 143 sales have been made, including 21 to Canada.

'Operation Avalanche' for China

More than 2½ tons of catalogues and data sheets of electronic components manufacturers are now on their way to China. Under an arrangement made between a Chinese electronics delegation which recently toured the UK and the Sino-British Trade Council, the product catalogues will be handed over to 50 main users of electronic components in the People's Republic of China.

The despatch of this large consignment of technical literature, known as 'Operation Avalanche', is part of the current British trade drive which has been directed towards the fast-growing Chinese electronics industry since Chinese specialists attended the London Electronic Components Exhibition in May this year.

Our picture shows the 50 parcels of catalogues going aboard the Shanghai-bound aircraft of the Pakistan International Airlines at Heathrow. From left to right: Mr. N. Gotting, PIA station manager, Heathrow; Mr. P. S. Marshall, Chinese secretary, and Miss Mary Penn, both of the Sino-British Trade Council; Miss Shahnaz, PIA air hostess; Mr. C. Jolley, of M. J. Druce Exports Ltd., and Mr. R. Chalfont, of Oceanair Freight Ltd., shipping agents for M. J. Druce Exports Ltd.

PIA
INTERNATIONAL

Mauritius pipe order

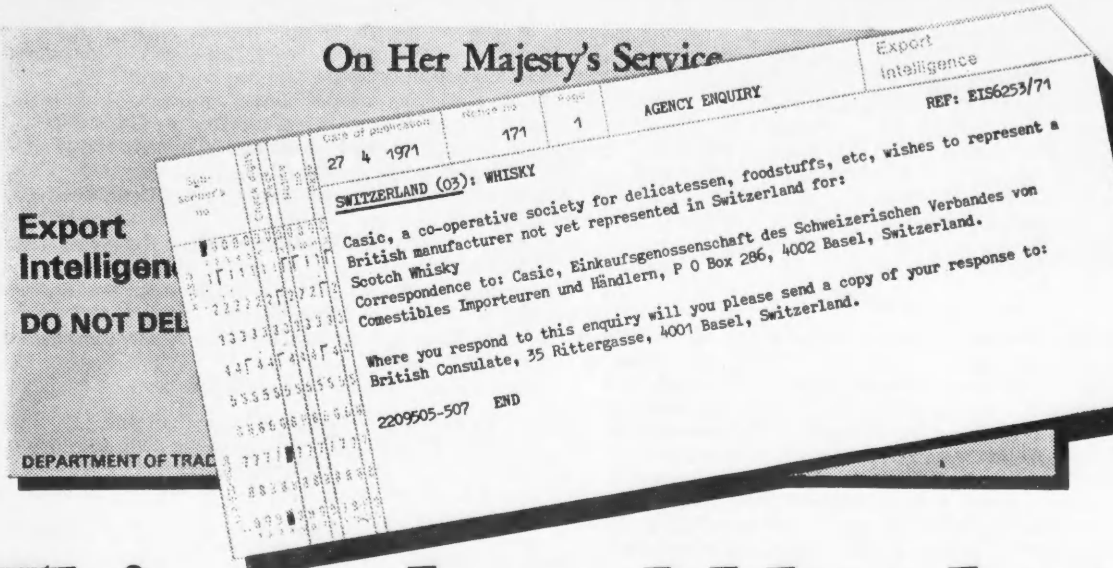
Hepworth Iron Co. Ltd. (Hepworth Ceramics Group) of Hazlehead, Sheffield, has received orders totalling £20,000 to supply the Mauritius public works department with plain-end vitrified clay pipes and fittings from the company's recently introduced HepSleve system of building drainage. The pipes, manufactured at the company's Woodville, Derbys., factory, are for housing schemes on the island.

The HepSleve system is now being used on a number of projects, including the Rashid Hospital at Dubai and the extension to the Pladgu Refinery in Indonesia. Ease and speed of laying in all weather and site conditions are claimed as features of the system.

Orders for CRT packages

The Electronic and Display Equipment Division of Ferranti Ltd. has received an order worth £44,000 for the supply of a large number of special cathode-ray tube packages to companies in the United States and the United Kingdom.

To be incorporated in photo-typesetting equipment made by Linotype-Paul Ltd., the order will be split between that company's UK plant and that of their US associate, Mergenthaler Linotype Co. Inc., of Wellesboro, Pa. Both orders are scheduled for completion before the end of the year, and the £24,000 American share represents the first direct overseas shipment of this type of device.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27 4 1971 | 171 | 1 | AGENCY ENQUIRY

REF: EIS6253/71

SWITZERLAND (03): WHISKY

Casic, a co-operative society for delicatessen, foodstuffs, etc, wishes to represent a British manufacturer not yet represented in Switzerland for:
Scotch Whisky
Correspondence to: Casic, Einkaufsgenossenschaft des Schweizerischen Verbandes von Comestibles Importeuren und Händlern, P O Box 286, 4002 Basel, Switzerland.

Where you respond to this enquiry will you please send a copy of your response to: British Consulate, 35 Rittergasse, 4001 Basel, Switzerland.

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Computerised Export Intelligence

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Value Added Tax in Italy

From the Commercial Section, British Consulate-General, Milan

ITALY is to introduce the Value Added Tax (VAT), known in Italy as IVA (Imposta Valore Aggiunto), on January 1, 1972. It is to take the place of a number of taxes, the most important of which are: Imposta Generale sull' Entrata (IGE) or general turnover tax; Imposta di Conguaglio (equalisation or compensatory tax) which is levied on importations; and the various municipal taxes on consumer goods. Italy is committed to the introduction of VAT because of the tax harmonisation programme of the European Economic Community. Similar taxes already operate in all other countries of the Community. It is, however, being introduced as part of a far-reaching reform of the entire Italian tax system. The Bill embodying this tax reform has not yet completed its legislative process. The information contained in this article cannot therefore be regarded as final or definitive, and the provisions which it describes remain subject to possible further amendment. This article does not claim to provide a complete description of the workings of VAT. Instead it provides a description of those parts of the Bill and draft regulations, **as they stand at present,** which are expected to be of most interest to British exporters.

Operation of the tax

All those who carry on economic activity in Italy for the production or exchange of goods or of services are liable for VAT. VAT is levied on the sales of goods and the provision of services. On every invoice the VAT due will be indicated separately. The purchaser pays the full amount, basic price plus tax. If he is also in industry or commerce and himself liable for VAT, he is entitled to deduct from the tax for which he is liable on his own sales, the tax which has already been paid on the goods or materials involved. Thus in effect the full weight of the VAT is borne by final private consumers. They, not being liable to the tax themselves, have no means of deducting the tax element in the purchases which they make. The actual sums involved are collected by the tax authorities at each stage in the process of the manufacture and distribution of goods or the provision of services.

Procedure for collection of tax

All companies or persons liable for VAT will be required to keep registers of their sales and purchases, indicating separately for each operation the relevant amount of tax due or deductible. Before the 25th of each month they will have to present to the tax office a declaration of the operations effected in the previous month. At the same time they will have to pay to the tax authorities the amount of tax which these documents show them to be liable for. The tax authorities will check this liability, and if they discover any variation, they will carry forward to the next month the relevant credit or debit. In addition, before February 25, of each year, those liable to VAT will have to present a comprehensive declaration of the total operations effected during the preceding year.

Non-deductible items

There will be exceptions to the right to deduct VAT paid on purchases of goods and services but no list has yet been published.

Repayment of VAT

Certain firms may find that the amount of deductions which they are entitled to claim exceeds the amount of VAT to which they are liable on their own sales. In this case the difference in their favour will be carried forward to the next month. However, if they prefer they will be entitled to claim a refund from the tax authorities.

Rates of tax

The normal rate of tax will be 12 per cent. This will be reduced to 6 per cent for the following categories of goods and services:

Basic necessities—ie agricultural and fishing produce, foodstuffs for general consumption, water, gas, electricity for domestic uses, pharmaceutical products, and common soaps.
Books, including ancient books, and audio-visual materials for teaching.
Daily newspapers and periodicals of political, trades union, cultural, religious or sporting character.
Services provided in connection with public performances, games, and entertainments.
Hotel services (except for luxury hotels), but only for guests staying at the hotels.
Sales of materials and products for the stone working industry in any form or degree of manufacture.
Scientific apparatus destined solely for research as certified by the National Research Council.
Fertilisers and phytosanitary products.

This list shows only the general principles governing the application of the lower rate of tax. The full list of the items to which it will be applied has not yet been published.

For certain other goods and services, not yet specified, the rate will be 18 per cent.

Exemptions

The following goods and services are exempt from VAT:
Sales of land and of firms, and certain financial transactions, particularly those connected with agricultural credit.
Provisions of services expressly exempted because of outstanding cultural or social benefits, payment for services provided with agricultural machinery for individual or associated agricultural enterprises, lettings and rentings of premises, insurance operations.
Exports, services relating to goods temporarily imported, international services or services connected with exporting to be determined in relation to international trade.
Ships and aircraft owned by the State, or destined for services which have been granted by the State, goods and services relating to the construction, furnishing, and fittings, or repair, transformation, or modification of these.

Imports

VAT is payable by whoever effects the importation of goods. For a company or individual normally subject to VAT, the amount paid on imported products can be deducted in the normal way from his liability to pay VAT on the subsequent sales of goods or materials.

Special provisions for small firms

Firms and individuals with a turnover of less than Lire 5 million per year will be exempt from VAT. Those with a turnover of up to Lire 21 million will have a reduced incidence of VAT, and a global assessment. Those with a turnover of up to Lire 80 million will have a simplified system for the application of the tax.

Transitional provisions

There will be transitional provisions to cover in particular the situation regarding stocks and capital equipment. Regarding stocks the firm will be entitled to deduct from its liability to VAT the IGE paid on goods purchased during the previous four months and still held in stock on December 31, 1971. This amount will be deducted not in a single amount in January 1972, but in instalments over a period of twelve months.

Regarding capital investment in fixed assets, the IGE paid on purchases of capital goods during the last six months before VAT is introduced, may be allowed as a deduction against liability to VAT As in the case of stocks, it will be deducted in 12 equal monthly instalments.

Further information

A further notice will be published in *Trade and Industry* as soon as possible after the appearance of the final and definitive version of the new legislation in the Italian *Gazetta Ufficiale*, when attention will be drawn to any amendments of substance affecting what has been stated in the present article.

EDB Ext. 466, 467, 482

UNITED KINGDOM AID TO DEVELOPING COUNTRIES—THAILAND: The reference point for further information on United Kingdom aid to developing countries—Thailand (see *Trade and Industry* dated September 16, page 552) was incorrect. It should read: **CRE Ext. 2252.**

ECGD BACKS £2.2 MILLION CONTRACT FOR MAURITIUS CARGO VESSEL: The Export Credits Guarantee Department signed on September 10 a Financial Guarantee covering the financing of a 14,910 tons deadweight SD 14 general cargo vessel, worth over £2.2 million, for Mauritius. The vessel will be owned by The Mauritius Steam Navigation Company Ltd., and is being built by Austin & Pickersgill Ltd., Sunderland. The vessel is scheduled for delivery at the beginning of 1974. A loan for 80 per cent of the contract value is being made available by Williams & Glyn's Bank Ltd., and is repayable over a period of eight years from the scheduled date of delivery.

In many cases further information on the notices published on these pages is available from the Department of Trade and Industry. The main branches concerned are: Commercial Relations and Exports (CRE) Division, DTI, 1 Victoria Street, London SW1H 0ET (Tel: 01-222 7877); and Export Services Division (ESD) and Export Data Branch (EDB), both at DTI, Export House, 50 Ludgate Hill, London EC4M 7HU (Tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (CRE, ESD or EDB) and the appropriate telephone extension number. In the Tariff and Trade Notices section countries are grouped by continents as far as possible; they are listed alphabetically on the contents page.

TARIFF & TRADE NOTICES

European Communities

COMMON AGRICULTURAL POLICY: The text of the following Regulation, which affects the agricultural sector in the EEC has been published in the *Journal Officiel des Communautés Européennes*. The French text of the Regulation may be seen on application.

Fruit and vegetables

Regulation (CEE) No. 1951/71 fixes the standard average values for the valuation of citrus fruits during the periods at the beginning of the 1971-2 import season (*Journal Officiel* No. L205 dated September 9, 1971).

EDB Ext. 7174, 408

IMPORTS FROM NON-MEMBER COUNTRIES: Decision 71/324/CEE authorises France to exclude from Community treatment tableware and other articles of a kind commonly used for domestic or toilet purposes of porcelain or china and of other kinds of pottery excluding pottery made from clay or stoneware (CCT. Nos. 69.11 and 69.12 C and D) originating in Japan and freely circulating in the other Member States (*Journal Officiel* No. L205 dated September 9, 1971).

EDB Ext. 7174, 408

HARMONISATION OF LEGISLATION: The *Journal Officiel des Communautés Européennes* No. L202 dated September 6, 1971 contains the texts of five Directives relating to harmonisation of legislation. The French texts of the Directives may be seen on application.

Directive 71/316/CEE concerns harmonisation of Member States' legislation regarding common provisions on measuring instruments and methods of metrological control.

Directive 71/317/CEE concerns harmonisation of Member States' legislation regarding parallelipidal weights of the average precision class for 5 to 50 kilogrammes and cylindrical weights of the average precision class for 1 gram to 10 kilogrammes.

Directive 71/318/CEE concerns harmonisation of Member States' legislation regarding gas meters.

Directive 71/319/CEE concerns harmonisation of Member States' legislation regarding meters for liquids other than water.

Directive 71/320/CEE concerns harmonisation of Member States' legislation regarding braking systems for certain categories of motor vehicles and trailers.

CRE Ext. 2354/5

CUSTOMS LEGISLATION: The *Journal Officiel des Communautés Européennes* No. L207 dated September 11, 1971, contains the text of Regulation (CEE) No. 1971/71 relating to the rate of exchange applicable, for the determination of the value for customs purposes in so far as it concerns the currencies of certain third countries. The French text of the Regulation may be seen on application.

EDB Ext. 7174, 408

France

CUSTOMS MODIFICATIONS: The French *Journal Officiel* of August 29 announced modifications to the French customs tariff with effect from September 1, 1971, and published a special supplement setting out changes in the general rules and the rates. The modifications are in accordance with EEC Regulation No. 1232/71 relating to the Agreement between the EEC and Turkey which was the subject of a notice in *Trade and Industry* of June 30, 1971, page 704.

EDB Ext. 423, 408, 288

Spain

CUSTOMS TARIFF MODIFICATION—COTTON NOT CARDED OR COMBED: The Spanish *State Gazette* of September 2 announced the following modification to the Spanish customs tariff valid until December 1, 1971.

Tariff heading	Description	Transitory duty
55.01	Cotton not carded or combed	4% *ad val*

HOME COMPENSATION TAX: The Spanish *State Gazette* of September 3 published Decree 2041/1971 issued by the Ministry of Finance reducing to 1.5 per cent until October 22, 1971 the Home Compensation Tax Levy on the following items:

Tariff heading	Description
03.02-A	Cod fish
26.01-A.2	Iron ore; other
27.01-A	Coal (the reduction will only affect coal suitable for coking, either directly or by mixture, imported by steel coking-plants for their own use in steel manufacture)
31.02-A	Natural sodium nitrate containing not more than 16 per cent of nitrogen

The Home Compensation Tax Levy on Tariff Heading 09.01-A unroasted coffee is reduced by 40 per cent during the same period.

(*continued on next page*)

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Telephone: Cherbourg 53 25 72. Telex: 77726

SPAIN
continued

CUSTOMS TARIFF MODIFICATION—ANTIPOLIOMYELITIS AND ANTI-MEASLES VACCINES: The Spanish *State Gazette* of August 24 announced the addition of anti-German measles vaccine to Tariff headings No. 30.02-A. 1 and No. 30.02-B 1.

EDB Ext. 462, 471/2/3

Yugoslavia

IMPORT REGULATIONS: The following goods may be imported up to the following amounts: in 1971:

1. Reproduction materials:	
1. 10.06/2b	12.000 tons
2. 12.06/7	1.000 tons
3. 17.03/1	80,000 tons
4. 25.01/1	65,000 tons
5. 25.01/2	500 tons
6. 25.01/4	5 tons
7. 25.01/5	5 tons
8. 25.01/6a	1 ton
9. 25.24/1	38,950 tons
10. 25.24/2	10 tons
11. 27.01/e-1	50,000 tons
12. 27.01/e-2	550 tons
13. 28.10/2a	1,600 tons
14. 28.47/1a	1,500 tons
15. 29.01/2-f-4	3,500 tons
16. 29.15/1c	3,500 tons
17. 29.16/1a	4 tons
18. 38.08/1	755 tons
19. 38.08/3b-1	145 tons
20. 68.13/1	40 tons
21. 70/05/1a	8,500 tons
22. ex 73.01/2a	86,000 tons
23. 73.01/2b	111,000 tons
24. 73.03/1a	240,000 tons
25. 73.03/2a	10,000 tons
2. Consumer goods:	
27. 04.03	7,000 tons
28. 09.01/1	37,000 tons
29. ex 10.06	10,000 tons
30. 15.01/1	5,000 tons
31. 17.01	150,000 tons

The holder of a contingent for the import of goods mentioned in Nos, 1, 27, 28, 29, 30, 31, is the Federal Directorate for Food Product Reserves, and for the import of goods from No. 11, the holder of a contingent is the Federal Directorate for Industrial Product Reserves.

The Federal Secretariat for Food Product Reserves will import coffee on condition that goods are exported to the country from which the coffee was imported unless this country disposes of payment resources made by the export of Yugoslav goods.

No further details are available.

EDB Ext. 420, 475

Israel

ADDITIONAL DUTIES: Following the devaluation of the Israel Pound on August 22, 1971, the authorities have published emergency regulations introducing two additional import duties. These duties, an Inventory Tax and an Import Tax, effectively uplift the price of imports by 20 per cent. Copies of the emergency regulations are available on request.

EDB Ext. 420, 475

The lists of Tariff, Customs and Import Regulations changes in overseas countries published in this section of *Trade and Industry* sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view. Items which fall into this category are preceded by the letters rtm. Readers should note that this prefix signifies that the words are registered as trade marks in the United Kingdom but that in the present context are assumed to refer generally to products of the descriptions stated in brackets. While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.

FUEL EXCISE ORDER: The Israeli authorities have issued an amendment to the Fuel Excise Order (Imposition of Excise) 1971, which was published in *Trade and Industry* on September 2. In the second item—Benzine—'70 per cent' has been superseded by '68 per cent'.

EDB Ext. 420, 475

Lebanon

REGULATIONS CONCERNING THE PRICING OF PHARMACEUTICALS: New measures concerning the pricing of imported and locally manufactured pharmaceuticals, effective from September 5, were reported in the September 9 issue of *Trade and Industry*. Implementation of these new regulations has now been postponed until September 15. Apparently implementation will be effected in stages but no further information is available at present.

EDB Ext. 420, 475

DUTY ABOLITION: Under Decree No. 1648, the import into Lebanon of 'epoxidised' animal and vegetable oils (huiles epoxydées) falling under Tariff heading no. 15.08.12 is exempt from customs duty with effect from August 14, 1971. Previously these products were subject to a duty of 25 per cent *ad valorem*.

EDB Ext. 420, 475

Jordan

IMPORT REGULATIONS: Further to the notice which appeared in *Trade and Industry* of August 11, a ruling was issued on September 5, exempting certain imports to Jordan routed via ports other than Aqaba from payment of the fine of 30 per cent of the value of the consignment, provided that the validity of the licences issued in respect of such goods is for one month only and they are non-renewable. The goods in question are eggs, butter, animal fats, cheese, frozen and fresh meats, tinned meats, potatoes, onions, garlic, baby foods and milk powder, animal feed, nuts, almonds, fine seeds, coffee, white cement and glass sheets, and will attract a fine of only 1 per cent.

EDB Ext. 420, 475

Libya

IMPORT RESTRICTIONS: Under a Law published on September 2, the Libyan Minister of Economy is authorised to regulate imports into Libya by banning or imposing restrictions on the import of any item or subjecting certain commodities to licensing control. Imports of tea and rice have been subjected to licensing control under a Decision issued on September 12.

EDB Ext. 420, 475

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REGISTRATION OF IMPORTERS AND EXPORTERS: Under Decree No. 41 of 1971 a register of Libyan importers and exporters has been established in the Ministry of Economy. To qualify for registration merchants must be Libyan nationals. Merchants not on the register are forbidden to engage in import or export activities.

EDB Ext. 420, 475

Saudi Arabia

BUDGET DETAILS: The Saudi Arabian Budget for the Arabic year 1391/92 (22.8.71 to 11.8.72) was announced on August 21. The salient features are: revenues and expenditures are 69 per cent higher than last year at Saudi Riyals 10,782 millions. This is a record increase in revenues and expenditures.

The main Ministry allocations are: Ministry of Defence—Riyals 2,589 millions (23.9 per cent of the Budget), Ministry of Communications—Riyals 1,799 millions, Ministry of Agriculture & Water—Riyals 569 millions, Ministry of Health—Riyals 463 millions.

Shortly before the publication of the Budget the Government abolished the JIHAD tax introduced last year together with duties on diesel oils. At the same time the duties on gasoline were reduced. Further details of projects which are likely to go ahead in 1971/72 are available on request.

CRE Ext. 2221 or ESD Ext. 577

Republic of South Africa

CUSTOMS TARIFF CHANGES: The following changes were notified in South African *Government Gazette* No. 3241 of September 3:

Notice R1531: The duty on olives and olive oil is amended to varying extents (Tariff Heading nos. 07.03, 15.07, 20.01 and 20.02).

R1532: The duty on canary seed is increased from 20 per cent or 83 c. per 100 lb. to 20 per cent or 455 c. per 100 kg. (Tariff Heading no. 10.07).

R1533: The description is amended to make it clear that both drained and glacé cherries are classifiable in subheading No. 20.04.20.

R1534: Temporary provision, free of duty, is made for citrus juices (Tariff Heading no. 20.07). This provision will be withdrawn 56 days from date of notification.

R.1535: Specific provision, free of duty, is made for malic acid (Tariff Heading no. 29.16).

R1536: The description is amended to make it clear that only perfumery containing ethyl alcohol is classifiable in subheading no. 33.06.10.

R1537: Subheading no. 48,07.10 is amended to make it clear that it also covers copying paper other than carbon paper.

R1538: The provision under tariff heading no. 39.07 is amended to make it clear that only bags of polyethylene, of a kind used for the packing of bread, are liable to an ordinary anti-dumping duty.

R1539: (1) Provision is made for a rebate of the full duty on certain raw materials for the manufacture of textile auxiliaries (Tariff Heading nos. 29.11, 34.02, 34.04, 38.12, 39.01).

(2) Provision is made for a rebate of the full duty on polyethylene terephthalate film, sheet or strip, for the manufacture of electric motors (Tariff Heading no. 39.01).

R1540: The rebate of duty on urea formaldehyde, for use as a binding agent in the manufacture of reconstituted wood, is made subject to the production of a permit (Tariff Heading no. 39.01).

EDB Ext. 471/2/3

Singapore

IMPORT CONTROL: The Singapore Import and Export Control Notice No.7/71 of August 28 states:

(i) that Inward Declarations for the import of fodder of non-animal origin need no longer be endorsed by the Director of Primary Production. Items covered by this notice include cereal straw and husks, fodder roots, hay, clover, kale, lupins, vetches, rice bran, other bran, copra cake, oil cake, coconut cake and meal, coconut oil refuse, prawn dust, tapioca refuse, sago refuse, broken rice, rolled oats, maize, coffee husks, etc. However, Inward Declarations for fodder of animal origin such as blood meal, bone meal, and

(continued on next page)

A listening post in

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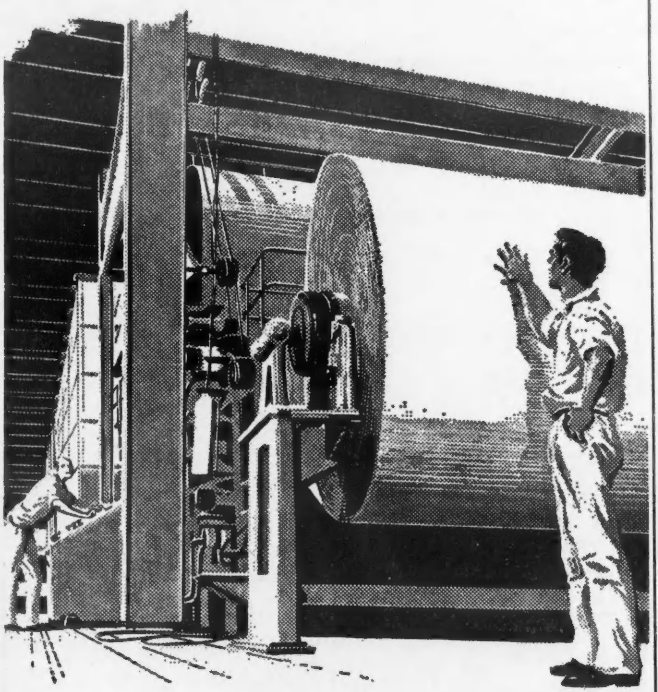

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SINGAPORE

continued

skimmed milk for animals continue to require the Director of Primary Production's endorsement.

(ii) that the import of Star Aniseed of whatever origin is subject to the endorsement of the Senior Health Officer, Environmental Health, Ministry of Health, Palmer Road, Singapore. The toxic variety of aniseed will not be permitted for import under any circumstances.

EDB Ext. 401, 468, 469

Australia

CUSTOMS INVOICES: To avoid delay to exports and creating Customs formality difficulties for Australian importers and agents, exporters are reminded that Customs invoices (combined invoices and certificates of value and origin) need to be completed in every detail, particularly in respect of origin codes as well as the country of origin. Combined invoices and certificates of value and origin in forms designed to contain prescribed information are required for all exports to Australia. Forms are available in two versions, one for use where entry under the British perferential tariff is claimed and another for all other goods. When claiming preferential entry it is particularly important that the country of origin of the goods concerned be entered in the relevant box on the invoice. In addition the letters 'A' ,'B' or 'C', representing the category under which the goods concerned are considered to qualify for preferential treatment, must be inserted in the 'Origin Code' column. Details of these categories appear on invoice forms, which are available from certain large commercial stationers. Where particular difficulty is experienced, for example in categorising goods A, B or C, or determining the appropriate level of current domestic value, firms may approach the Australian Customs Representative, Canberra House, 10-16 Maltravers Street, Strand, London WC2 for advice.

EDB Ext, 401, 468, 469

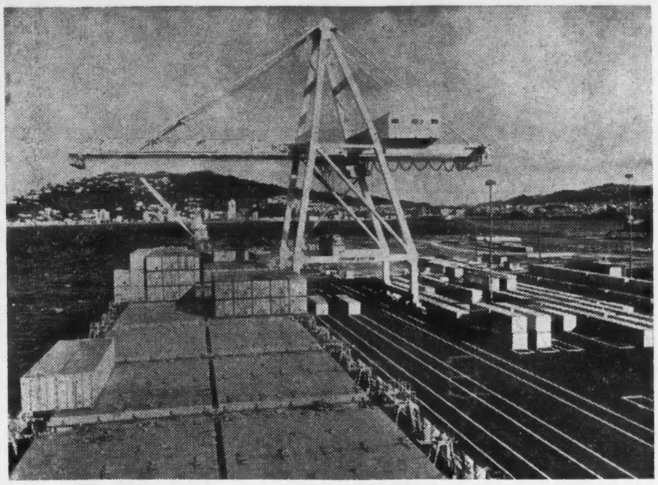
RESULT OF TARIFF BOARD INQUIRY ON LIGHT-WEIGHT COTTON SHEETING: Changes have been made in the Australian customs tariff affecting the rates of duty payable on the above commodities. Particulars of the changes will be published in *Trade and Industry* as soon as possible. In the meantime brief details may be obtained from Export Data Branch.

EDB Ext. 401, 468, 469

RESULT OF SPECIAL ADVISORY AUTHORITY INQUIRY ON WOVEN MAN-MADE FIBRE FABRICS: A notice was published in *Trade and Industry* on August 19 to the effect that a reference had been made to the Australian Special Advisory Authority in respect of woven man-made fibre fabrics. The inquiry has now been held and as a result of the Special Advisory Authority's recommendations temporary additional duties of 10 cents per sq. yd. will be imposed on most types of imported man-made fibre fabrics and 15 cents per sq. yd. on woven fabrics containing over 10 per cent and less than 50 per cent of silk in admixture with 20 per cent or more of man-made fibres. Polyester/cotton mixture fabrics weighing less than 3.8 ounces per sq. yd. and some other types of fabrics will be exempt from these duties. These new duties will not apply to goods in direct transit to Australia on or before August 9, 1971. Further details will be published as soon as possible.

EDB Ext. 401, 468, 469

In many cases further information on the notices published on these pages is available from the Department of Trade and Industry. The main branches concerned are: Commercial Relations and Exports (CRE) Division, DTI, 1 Victoria Street, London SW1H 0ET (Tel: 01-222 7877); and Export Services Division (ESD) and Export Data Branch (EDB), both at DTI, Export House, 50 Ludgate Hill, London EC4M 7HU (Tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (CRE, ESD or EDB) and the appropriate telephone extension number. In the Tariff and Trade Notices section countries are grouped by continents as far as possible; they are listed alphabetically on the contents page.



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Jamaica

IMPORT LICENSING ARRANGEMENTS: The list of exceptions to the Jamaica Open General Licence (*Board of Trade Journal* of September 27, 1968, page 865) has been amended by the addition to item 108 Plastics (including PVC) of the sub-item (iii) Laminated plastic sheets.

EDB Ext. 474, 476, 7312

Dominican Republic

COMPULSORY INSURANCE REQUIREMENT: Under the new Insurance Law which enters into force on August 21, 1971, freight transport insurance of imported goods must be effected with insurance companies authorised to operate in the Dominican Republic. From that date importers are therefore required to conclude contracts on the basis of FAS, FOB or C & F prices. Imports covered by letters of credit opened before August 21 will not be affected while the letters of credit remain valid.

EDB Ext. 474, 476, 7312

IMPOSITION OF STAMP DUTY ON IMPORT DOCUMENTS: Dominican Republic Law No. 169 has added a special stamp tax of RD$1.00 on all import documents accompanied by a consular invoice where the value of the goods exceed RD$100.00.

EDB Ext. 474, 476, 7312

INCREASE OF SURCHARGE ON IMPORTED GOODS: The authorities in the Dominican Republic have issued Law No. 136 which has the effect of raising the surcharge on all imported goods from 3 per cent to 4 per cent. This surcharge is levied on the import duty and other taxes payable on the goods. The Law took effect on June 9, 1971, the date of publication in the *Official Gazette*.

EDB Ext. 474, 476, 7312

Panama

IMPORT QUOTA FOR CAST IRON DRAINAGE PIPES AND FITTINGS: Cast iron drainage pipes and fittings have been made subject to a provisional quota for six months which must not exceed 20 per cent of the average imports into Panama for 1969 and 1970. The quota will remain in force until protective import tariffs are announced.

EDB Ext. 7312, 474, 476

Guatemala

NEW ADDRESS FOR BRITISH CONSULATE: The new office address of the British Consulate in Guatemala City is as follows: British Consulate, Edificio Maya, Via 5, No. 4-50, 8° Piso, Zona 4, Guatemala City. Telephones: Edificio Maya—64691/4 and 60693/6 Ext. 355, 356 and 357. PO Box No. 8 remains unchanged.

Argentina

BAN ON DOCUMENTARY CREDITS/SUSPENSION OF IMPORTS: A communique published by the Central Bank of Argentina states that until further notice banks may not open documentary credits nor handle any other form of bank operation relating to new imports. It would appear that this effectively bans all imports for the time being. No guidance has been given by the Government regarding its intentions, but the expectation reported is that complementary measures covering essential imports will be published shortly. Further information will be published as soon as it becomes available.

EDB Ext. 474, 476, 7312

Chile

PRIOR DEPOSITS: Chilean Circular No. 1550 of August 11, 1971 imposed a prior deposit of 10,000 per cent *ad valorem* cif on the following goods:

Tariff No.	Description
49.02	Comics and the like
Ch. 84 Gen. Heads.	Semi-industrial commercial washing installations consisting of six washing machines with a total capacity of at least 48 kilos of dry clothing, one spin-dryer and one ironer with all spare parts therefor, all coin-operated Dry cleaning machines

EDB Ext. 474, 476, 7312

AMENDMENTS TO IMPORT TARIFF: Chilean Decree No. 1239/71 published in the *Diario Oficial* of August 17 increased the import duties on the following goods:

			Rate of duty	
Tariff no.	Description	Unit	Specific Gold Pesos	Ad val. cif
91.02.01	Alarm clocks	KG	Free	170%
91.04.01	Alarm clocks	KL	Free	170%
93.04.01	Sporting and target shooting guns, rifles and carbines	KL	Free	250%

EDB Ext. 474, 476, 7312

Uruguay

PRIOR DEPOSITS: Uruguayan Central Bank Circular No. 281 of July 21 gives details of exemptions from prior deposits (consignaciones) for the period July 1 to December 31, 1971. Provisions for capital goods remain as before. In the case of other goods, with certain exceptions, an importer may import free of deposit a quota equal to 30 per cent of his deposit-free imports of similar goods during 1970.

EDB Ext. 7312, 474, 476

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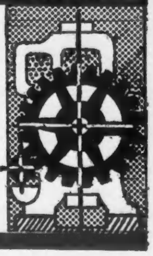

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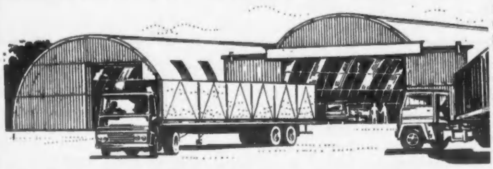

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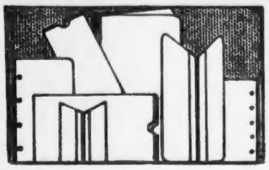

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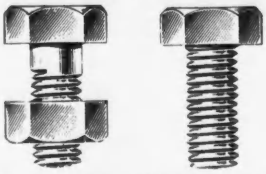

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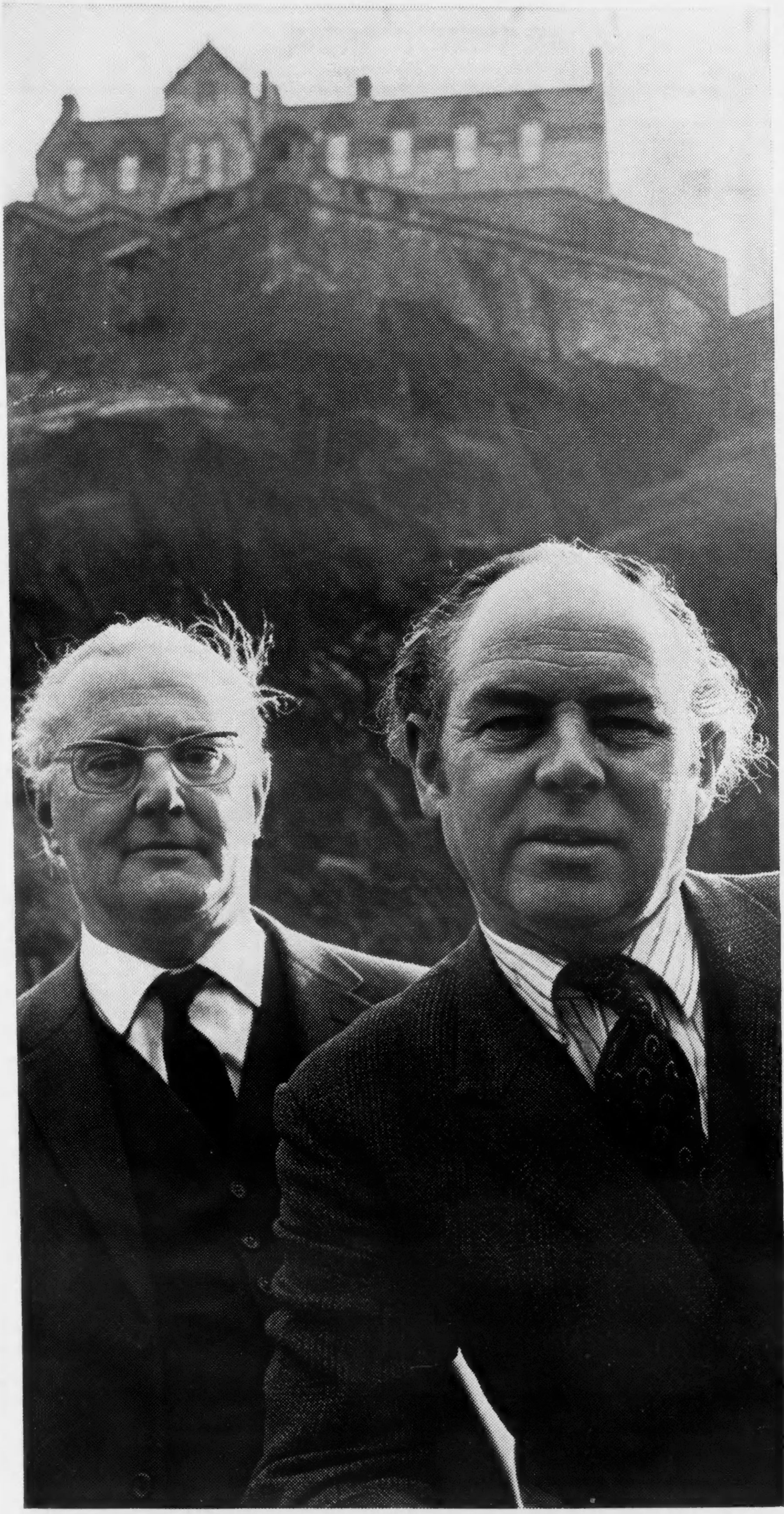

Exporters who didn't lose £15,000.

Trouble isn't always foreseeable. These are very experienced and prudent exporters – joint managing directors of a famous Scottish knitwear company. One of their distributors in an important overseas market had an outstandingly good record. He had built up sales 'in a remarkable way'.

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